

Viewing and Updating Word Documents in SharePoint

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Sample

Introduction

Document sharing and collaboration is a quick and easy way for your team to work efficiently to produce or review documentation. This reduces email flows, eliminates overlap, and simplifies the work stream and locating the most current version.

This job aid will provide instructions on how to:

- Saving a Word (.docx) document to SharePoint
- Updating or revising the document
- Viewing another person's changes
- Reverting to a previous version of the document
- Opening document in Internet Explorer

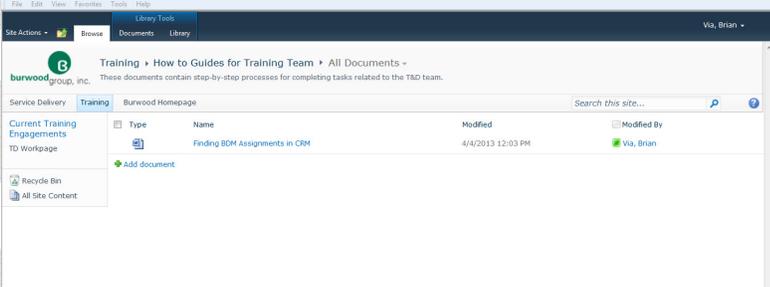
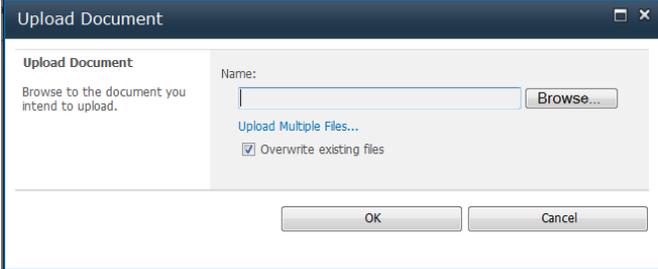
Considerations

- In SharePoint, **only Word (.docx) files can be used for collaborative efforts**. PowerPoint (.pptx) and Excel (.xlsx) files are not supported and the following steps will not work with these file types.
- Use Internet Explorer 9 for best results; SharePoint functionality may not work with other Internet tools (e.g. Chrome or FireFox).

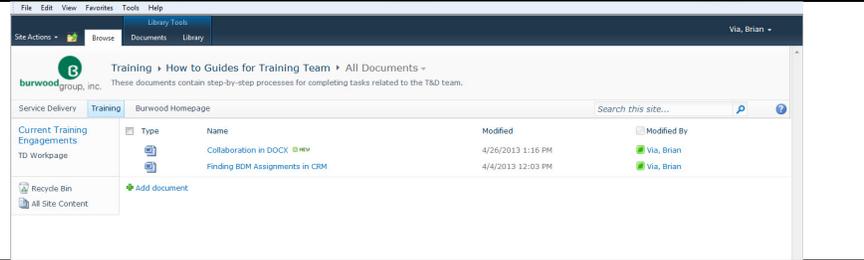
Saving a Word Document to SharePoint Folder

Follow these steps to upload a Word (.docx) Document onto your SharePoint Folder

NOTE: You must have system access and write permissions on the site to do this.

<p>1) Create or open a folder on the SharePoint site. Click Add Document.</p>	
<p>2) The <i>Upload Document</i> dialog box appears. Click Browse, locate the document, and click OK. NOTE: To upload multiple documents at the same time, click Upload Multiple Files...</p>	

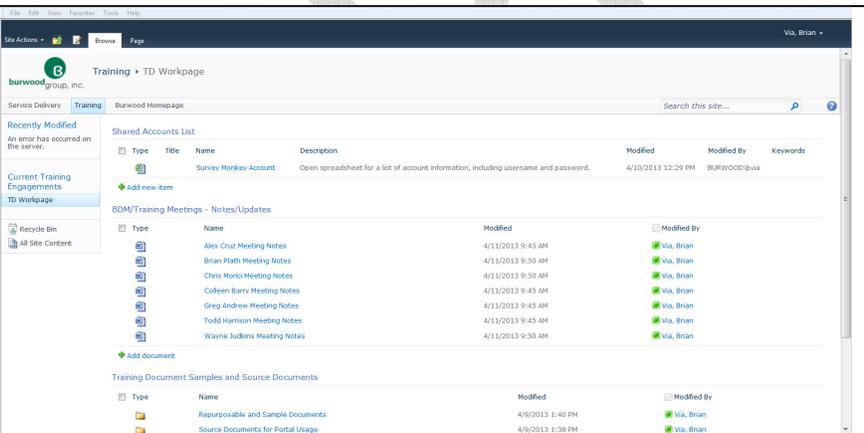
3) The document appears in the library.



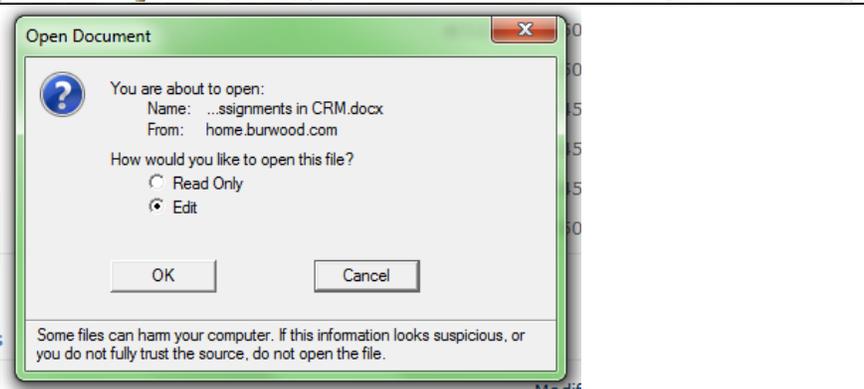
Collaborating on a Word (.docx) Document in SharePoint

Follow these steps to collaborate on a Word document with your team:

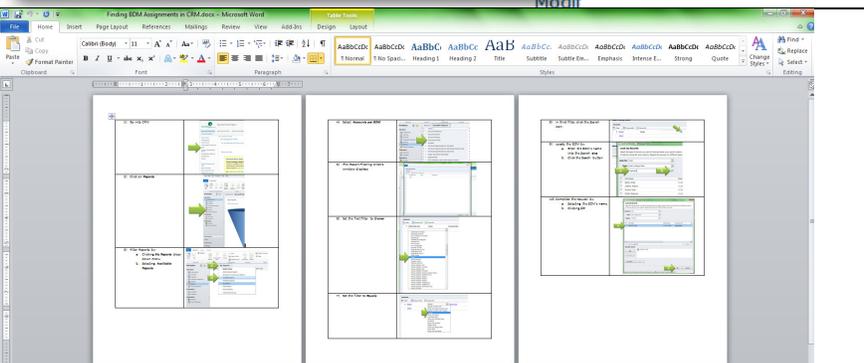
1) Save a Word document to a SharePoint folder on your team site.
(For instructions on saving a Word document see: [Saving a Word Document to SharePoint Folder](#))

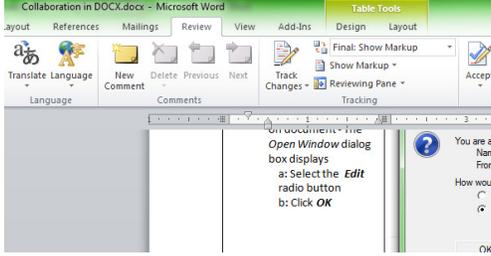
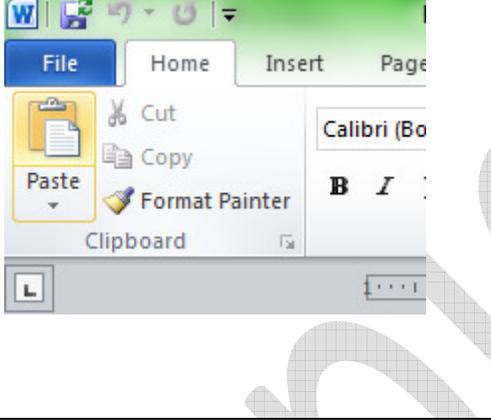


2) Open document from SP folder by clicking on document - The *Open Window* dialog box displays:
2 a: Select the **Edit** radio button;
2 b: Click **OK**.



3) The Word document displays – make the desired changes to the document.



<p>4) (OPTIONAL STEP) Highlight your changes, utilize the track changes features: to turn this on go to <i>Review</i> <i>Track Changes</i> on the Word Ribbon.</p>	
<p>5) Make the changes to the document and click the Save button.</p> <p>NOTE: This action also refreshes your screen to display any simultaneous updates that other users may have made since you opened the document.</p>	
<p>6) Close the document by clicking the red "x" at the top right or go to <i>File</i> <i>Exit</i>.</p>	

To See Other's Changes/Updates

Follow these steps in order to see another person's change that may have been made from the time you opened the document.

<p>1) Click the Save button to refresh your screen. This will update the document to display changes/updates that other users may have made since you opened the document.</p>	
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Reverting to a Previous Version

Follow these steps to:

- 1) Set up a folder to include versioning functionality.
- 2) Review a previous version of a document (if multiple copies exist).