

# Training Manual

# Work With Documents

## SharePoint 2013 – GTA Platform

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**Support:** For further assistance, fill out a Support Request at <http://portal.georgia.gov/support>

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## How to Use this Guide

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This manual will be used to provide you with hands on experience in working with documents. It will also serve as a handy reference guide.

It is assumed that you have already confirmed that you are using the Internet Explorer version 11 browser.

## Accessing Exercise Files

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You will find all the exercise files for this training session at

[https://mygta.ga.gov/portal/spsupport/sptraining/SP\\_Training\\_Resources](https://mygta.ga.gov/portal/spsupport/sptraining/SP_Training_Resources)

## Exercise 1: Access SharePoint

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### 1.1 Login to myGTA

You can log in to access to the myGTA SharePoint site.

**Exercise Files:**

- None

To login to the SharePoint site,

1. Open a browser window using Internet Explorer 11
2. Enter the URL for myGTA:  
<https://mygta.ga.gov>
3. When prompted, enter your SOG login credentials and click OK



4. SharePoint will display the myGTA home page

### 1.2 Log out from myGTA

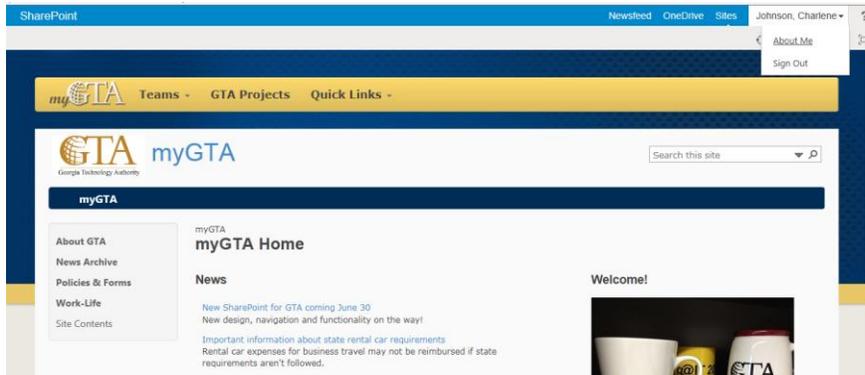
You can log out to close your myGTA session.

**Exercise Files:**

- None

To log out of a myGTA session in,

1. From any page on the browser, click on your name in the upper right corner and a drop down will display
2. Click **Sign Out**



## Exercise 2: Sorts and Filters

### 2.1 Sort a Library

You can sort a library in either ascending or descending order.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint Job Aids**

To sort a library in ascending order,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. On the Quick Launch, click **SharePoint Job Aids**
5. SharePoint will display a list of the contents of the **SharePoint Job Aids** library
6. On the column heading, click the arrow to the right of **Name** and a drop down list is displayed
7. From the drop down list, click **Ascending**
8. SharePoint will display the list in ascending order of **Name**
9. Then on the column heading, click arrow to the right of **Name** and a drop down list is displayed
10. From the drop down list, click **Descending**
11. SharePoint will display the list in descending order of **Name**

### 2.2 Filter a Library

You can filter a library to display items that meet the filter criteria.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint Job Aids**

To filter a library using two filter criteria,

1. On the gold bar, click **Teams**

2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. On the Quick Launch, click **SharePoint Job Aids**
5. SharePoint will display a list of the contents of the **SharePoint Job Aids** library
6. On the column heading, click the arrow to the right of **TrainingTopic** and a drop down list is displayed
7. From the drop down list, click any two boxes
8. SharePoint will display the items that have the selected values for the **TrainingTopic**

## Exercise 3: Manage Documents

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### 3.1 View a pdf Document

You can view pdf documents in a library.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint Job Aids**

To view a document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. Navigate to the **SharePoint Support** landing page
4. On the Quick Launch, click **SharePoint Job Aids**
5. Select any pdf document and click on the ellipses
6. SharePoint will display a pop up menu box
7. From the pop up menu box, click **OPEN**
8. SharePoint will display the pdf document

### 3.2 View a Word Document

You can view Word documents in a library.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**

To view a Word document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. In the **Documents** list, select any document and click on the ellipses
6. SharePoint will display a pop up menu box with a preview of the Word document and another set of ellipses
7. From the pop up menu box, click the ellipses

8. SharePoint will display a drop down
9. From the drop down, click **View in Browser**
10. SharePoint will display the document in Word

### 3.3 Check out and edit a Document

You can check out a document and then edit it.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Document Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

**Note:** Not all users will have permission to check out / check in a document.

Also check out / check in may be a requirement for some libraries.

To check out a document and edit it,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. In the **Documents** list, select **Sample Doc xx** and click on the ellipses
6. SharePoint will display a pop up menu box with a preview of the Word document and another set of ellipses
7. From the pop up menu box, click the ellipses
8. SharePoint will display a drop down
9. From the drop down , click **Check Out**
10. SharePoint will redisplay the library and a green icon  will indicate that the document is checked out to you.
11. Select **Sample Doc xx** that is checked out to you and click on the ellipses
12. SharePoint will display a pop up menu box
13. From the menu box, click **EDIT**  
Note: You may be asked to enter your SOG credentials.
14. SharePoint will display the document in Word and you can edit it and then save the changes.

### 3.4 Check in a Document

You can check in a document after you have finished editing it.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Document Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

**Note:** If you are already editing the document, go to step 10.

To check in a document after editing it,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. In the **Documents** list, select **Sample Doc xx** that is checked out to you (green icon  ) and click **EDIT**
6. SharePoint will display the document in Word and you can edit it
7. From the Word tool bar, click **File**
8. Click **Check In**
9. SharePoint will display the Check in box
10. Enter meaningful comments regarding the changes that were made
11. Click **OK**
12. From the Word tool bar, click **File / Exit**
13. In the **Save Changes** box that is displayed, click **Yes**.
14. In the **Check in** box that is displayed, click **Yes**.
15. In the **Version Comments** box that is displayed, enter comments about the changes that were made.
16. SharePoint will display the library, the green icon  will not display next to **Sample Doc xx** because the document has been checked in. Your changes will be available for all users.

### 3.5 Delete a Document

You can delete a document and SharePoint will move it to the Recycle Bin.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Document Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

**Note:** Not all users will have permission to delete a document.

To delete a document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. In the **Documents** list, select **Sample Doc xx** which is the document you want to delete and click on the ellipses
6. SharePoint will display a pop up menu box with a preview of the Word document and another set of ellipses
7. From the pop up menu box, click the ellipses
8. SharePoint will display a drop down

9. From the drop down, click **Delete**
10. SharePoint will display the confirmation box
11. Click **OK**
12. SharePoint will move the document to the Recycle Bin

## Exercise 4: Work with Document Properties

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### 4.1 View Document Properties

You can view the properties of a document, e.g. the title, the date the document was created, the version, etc.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Document Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

To view the document properties,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. Select **Sample Doc xx** and click on the ellipses
6. SharePoint will display a pop up menu box
7. From the pop up menu box, click the ellipses
8. SharePoint will display a drop down
9. From the drop down, click **View Properties**
10. SharePoint will display the properties of the document

### 4.2 Rename a Document

You can rename a document.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab**
- **Name: Sample Doc xx**, where xx is your student number: 01, 02, 03, etc.

To rename a document,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Student Lab**
5. Select **Sample Doc xx** and click on the ellipses
6. SharePoint will display a pop up menu box
7. From the pop up menu box, click the ellipses

*Revised 03/03/2014*

8. SharePoint will display a drop down
9. From the drop down, click **Edit Properties**
10. SharePoint will display the properties of the document and the properties can be edited
11. Change the **Name** of the document by adding your initials to the current document name
12. Click **Save**
13. SharePoint will change the **Name** of the document and also update the Modified and Modified By information.

Note. When you are finished with this exercise, rename the document back to the original name (remove your initials from the name): **Sample Doc xx**

## Exercise 5: Add Documents to a Library

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### 5.1 Drag and Drop Documents

You can drag and drop one or more documents into a library.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
  - **Document Name: Sandbox-library**
- **An existing file on your laptop file or create a new file for testing**

To drag and drop a document into a library,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sandbox-library**
6. Resize the screen and open explorer to view your documents on your laptop
7. Select one or more documents from your laptop and drag them to the library in the **drag files here** section
8. SharePoint will copy each selected document that you dragged from your laptop to the library

### 5.2 Upload a Document

You can upload a document into a library.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
  - **Document Name: Sandbox-library**
- **An existing file on your laptop file or create a new file for testing**

To upload a document into a library,

1. On the gold bar, click **Teams**

*Revised 03/03/2014*

2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sandbox-library**
6. In the content area, click **new document**
7. SharePoint will display a drop down
8. Click **UPLOAD EXISTING FILE**
9. Browse your laptop and select a document to upload and then click **OK**
10. SharePoint will copy the selected document from your desktop to the library

### 5.3 Create a Document from SharePoint

You can create a document from SharePoint.

#### Exercise Files:

- **Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox**
  - **Document Name: Sandbox-library**
- **An existing file on your laptop file or create a new file for testing**

To create a document from SharePoint,

1. On the gold bar, click **Teams**
2. On the drop down, click **Portal**
3. On the blue bar, click **SharePoint Support**
4. From the drop down list, click **SharePoint 2013 Training** then click **SharePoint Training Sandbox**
5. From the Quick Launch, click on **Sandbox-library**
6. In the content area, click **new document**
7. SharePoint will display a drop down
8. Click **Word document** or **Excel workbook**
9. SharePoint will open a blank document using the web version of Microsoft Office
10. Edit the blank document
11. Click **File / Exit** and then click **Save** to save the document
12. SharePoint will save the document in the library