

Accessing and Editing Documents on SharePoint

There are many new editing features within the new version of SharePoint. For Word and most Excel documents, you are able to directly edit the file online, with web based Office apps.

Editing Word and Excel docs via web browser

The recommended way to edit Microsoft Word and Excel Documents within SharePoint, is to do so directly within your Internet Explorer Browser. There are several advantages to this method. This method allows multiple collaborators on a document, without the possibility of a user unknowingly overwriting updates another user may have made to the document. This also will use fewer system resources, and allows you to access Word and Excel documents on a personal computer or tablet device that may not have Microsoft Office accessible or available.

To edit files within your browser, you will navigate to the folder of the file you are accessing in SharePoint. Please note, Internet Explorer may be required to edit files within the browser.

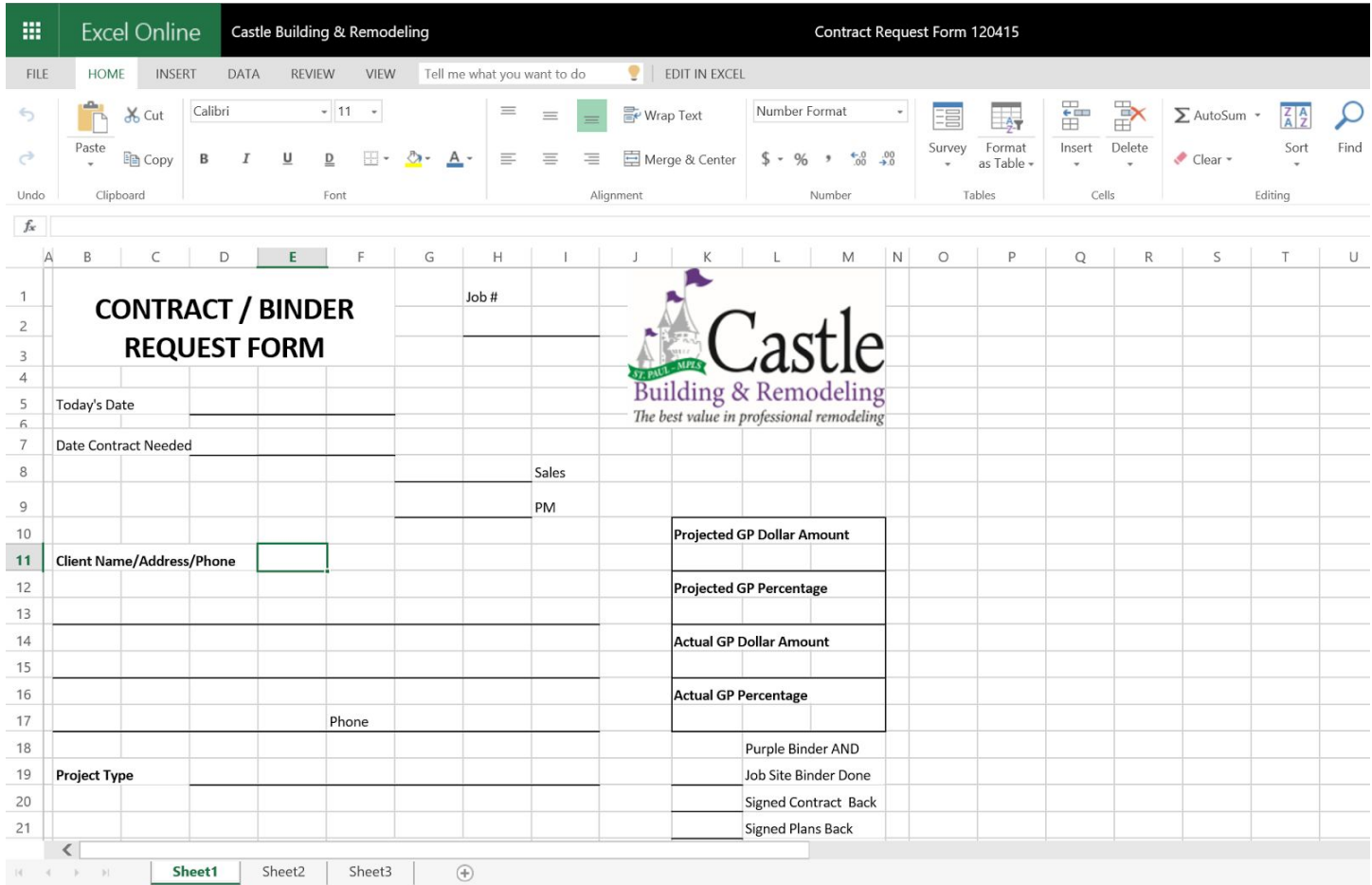
Once you have located the file you would like to edit, you will select the box to the left of the file, and click the "Open in Word/Excel **Online**" dropdown from the menu, as shown below

The screenshot displays the SharePoint interface for a document library titled "Castle Building & Remodeling". The left-hand navigation pane includes sections for "Libraries", "Documents", and "Lists". Under "Documents", "Castle Files" is selected. The main content area shows a list of files and folders. A dropdown menu is open over the "Open" button, offering "Open in Excel Online" and "Open in Excel". The file "Contract Request Form 120415.xlsx" is highlighted in the list, indicating it is the selected item.

Name	Modified
Change Orders	December
Old	September
Backlog Tracker.xlsx	September
BAM Building Performance Guidelines.pdf	February 1
ClientReferralRewards.pdf	April 23
Contract Request Form 092515.pdf	September
Contract Request Form 120415.pdf	March 9
<input checked="" type="checkbox"/> Contract Request Form 120415.xlsx	March 25
CONTRACT Template 2016.pdf	June 21

This will open up a new browser window, which gives you full editing capabilities on the file. Changes to the file are done in real-time, and the file is always being automatically saved in SharePoint.

An example of that file being edited within Internet Explorer is shown below



There are some restrictions to this method, namely, only Excel, Word, and Powerpoint documents can be edited online. Other documents like PDF's, are view or download only.

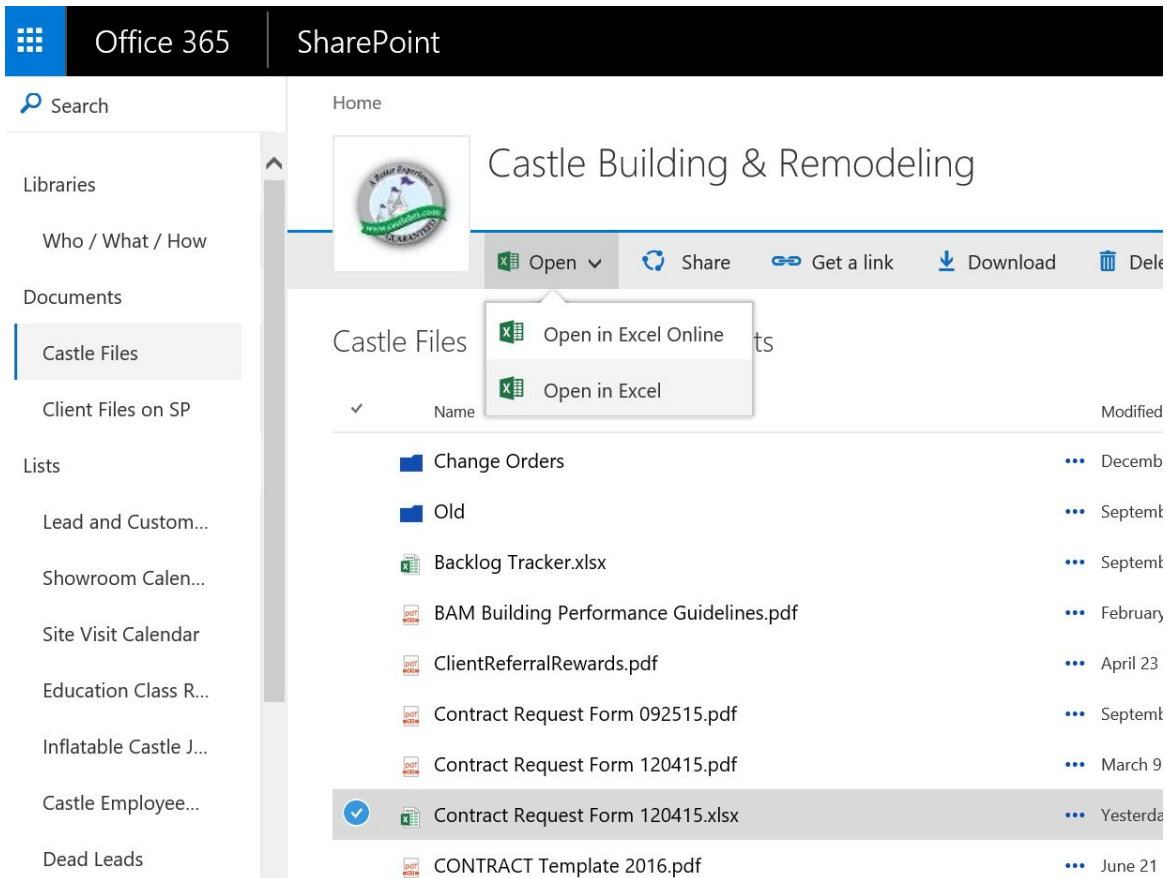
Also, there may be some Excel documents which contain macros which are incompatible with online editing. In those instances, you will use the alternate method as shown below.

Editing Word and Excel Documents via Local Office Applications

SharePoint allows you to continue to use your existing Microsoft Office Applications on your computer (Word, Excel, Outlook), and will directly connect to SharePoint to save document changes made in those apps, directly back to SharePoint. You may also be required to use this method for working on specific Excel files, in which the macros are not compatible with the online versions of Excel.

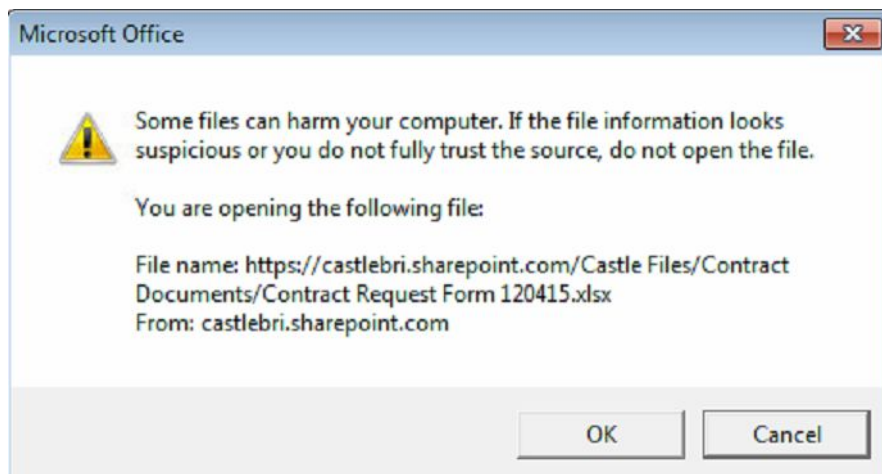
To edit files via Local Office Applications, you will navigate to the folder of the file you are accessing in SharePoint.

Once you have located the file you would like to edit, you will select the box to the left of the file, and click the “Open in Word/Excel” dropdown from the menu, as shown below

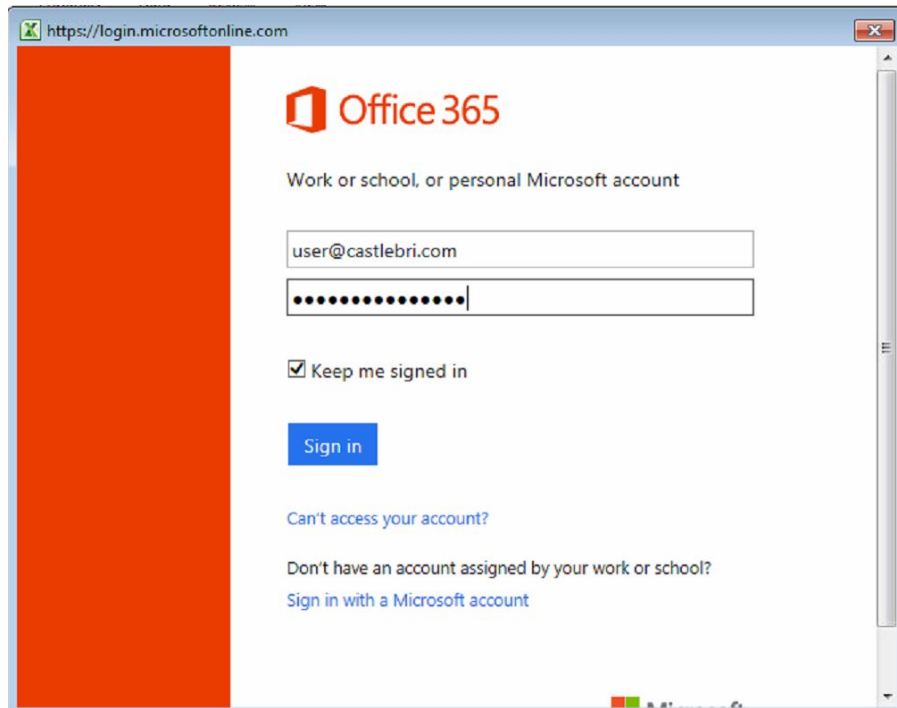


Alternatively, you may click the file name directly, which will open the file via Local Office Applications.

When you open a sharepoint file in your Local Office Apps, you may receive the below dialog box, please click “OK”.



You will also periodically be asked to re-enter your credentials using the dialog box below. Make sure to check the “Keep me signed in” box, and then click “Sign in”



Your file will now open up in your Local Office Application (Word/Excel/Powerpoint). After you are finished editing the document, you may save it normally, and the changes will be then uploaded back to SharePoint.