User Documentation for DSC CM SharePoint Sites

How to Upload a Document

Uploading a document is a 2 step process:

1. The first step uploads the file without making it usable or viewable to other users
2. The second step assigns properties about the document to the file to make it available to others

At the Homepage of your project site:

Click on the appropriate link (usually the Upload Assist Page) located below the title of your project:

1. Hover over the menu to find the type of document(s) you intend to upload.
2. Click on the link to the document type
3. On the form which appears, click “Browse” to find the file to upload
4. Click “OK”. This will automatically upload the file to the appropriate location.
5. On the “Properties Form” which appears fill in the information requested. The fields with asterisks are required to successfully upload a file.

You may upload multiple documents, but you will need to go back to complete the properties form for each document before the file is available to others.

1. Hover over the menu to find the type of document(s) you intend to upload.
2. Click on the link
3. In the form which appears, click “Upload Multiple Documents” to navigate to the files to upload.
4. Select the files to upload.
5. Click “Open”. This will automatically direct the files to the appropriate location on the SharePoint site. Make note of the folder listed in the box…
6. Click “Open”
7. Now navigate to the folder location to find the files. The documents needing more information will be marked with a green check indicating that they are checked out to you.
8. Click on the box to the left of the name which appears when you hover over the file to highlight it.
9. In the Microsoft ribbon which appears at the top of the page click on the “Edit Properties” button.
10. On the “Properties Form” which appears fill in the information requested. The fields with asterisks are required to successfully upload a file.

Note: There are 3 individual links for frequently used document types (Submittal – Action, Submittal-Informational, and RFI) which can be used in lieu of the Upload Assist link.

How to Locate a Document:

Using the Tree on the left of the homepage:
Navigate to the document by using the tree view on the left of the homepage. This is structured like NPS workflows at: http://www.nps.gov/dscw/construction.htm
An interactive link is available back to workflows which changes as you navigate through folders with the tree view to view documentation about each area of the construction management process and to locate forms and templates.

1. Click on the library to unfold the folders available
2. Click on the folder in the tree view to display the documents in the folder
3. Click on the triangle at the end of the breadcrumb path to choose a view available to sort and filter the list of documents.
4. Much like an excel spreadsheet, clicking on the headings at the top of the list of documents can further sort and filter the list of documents.

Using the Search function:
At the top of every page is a box with "Search this site" in it (note: if you don't see it, click on the "Browse" tab and be sure you are at the top of the page).

1. Fill in information which you might know about the document you would like to locate
2. The results will be a list with all documents found on the site (or within the folder or library from which you are searching). Not only will the list have documents with the search words in the title, it will look inside all documents for search words.
3. Refine this list by choosing a refiner on the left. Refiner choices include type of document, site, author, and modified date.
4. Click on the name of the document to take you directly to the document.

How to Review a Document:

Locate the document you would like to review.

1. Hover over the document, put a check in the box which appears to the left (this will highlight the file in green)
2. In the “Documents” tab of the Microsoft ribbon which appears at the top, click on the “Edit Document” button (directly below the Documents Tab of the ribbon)
3. Click “OK”.
4. View as needed and “X” out to close the window.

Alternately:

1. Click on the name of the file.
2. Click “Read Only” when prompted “How would you like to open this file?”
3. View as needed and use the back button at the top of your browser window to close the document and get back to the site. (Note: if you “X” out you will close the whole SharePoint browser window).

Or:

1. Hover over a document, put a check in the box which appears to the left (this will highlight the file in green)
2. In the “Documents” tab of the Microsoft ribbon which appears at the top, click on the “Download a Copy” button (about in the middle of the ribbon)
3. Click “Open” (or save to edit on your computer)
4. View as needed and “X” out to close the window.

How/Why to Check-Out a Document:

When you “Check Out” a document it locks the file to other users and marks the file as checked out with your name. Although the file is locked when you simply edit it, this is also a safeguard from losing work by someone editing the document at the same time if you lose internet connection.

To Check Out a File:

1. Navigate to the folder location to find the file to “check out”.
2. Click on the box to the left of the name which appears when you hover over the file to highlight it.
3. In the Microsoft ribbon which appears at the top of the page click on the “Check Out” button.

To Discard Check Out:

1. Hover over a document, put a check in the box which appears to the left (this will highlight the file in green)
2. In the “Documents” tab of the ribbon which appears at the top, click on the “Discard Check Out” button
3. Form pops up: click “OK” (this will make the file available for other users without change)

How to Edit a Document:

There are various methods available in SharePoint to edit a document. This is the most basic method of checking out a document, saving a copy to your preferred location, editing the file, uploading the file back to SharePoint, and checking the document in for others to utilize.

Check Out the File:

1. Navigate to the folder location to find the file to “check out”.
2. Click on the box to the left of the name which appears when you hover over the file to highlight it.
3. In the Microsoft ribbon which appears at the top of the page click on the “Check Out” button.

Edit the File (Best Practice if your particular computer settings support it):

1. Before you click “OK” as you check out a document: check the “Use my local drafts folder” box
2. Go to your “SharePoint Drafts” folder in the “My Documents” folder on your computer. Locate the file you checked out, and edit as needed.
3. **With an Office Document** the file will prompt you to “Check In” the document when you close the document after editing it.
   With a PDF, Upload the file following the steps above. This step will “Check In” a checked out document and make it available for other users.

Edit the File (If above does not work):

4. Hover over the name of a document
5. Right click, “save target as”, navigate to desired location, “save”
6. Navigate to the file you saved
7. Make your changes to the file as you normally would
8. Save as normal on your computer
9. Upload the file following the steps above. This step will “Check In” a checked out document. Making it available for other users.

Check In the File by Uploading It:

At the Homepage of your project site:

1. Click on the appropriate link (usually the Upload Assist Page) located below the title of your project:
2. Hover over the menu to find the type of document(s) you intend to upload.
3. Click on the link to the document type
4. On the form which appears, click “Browse” to find the file to upload
5. Click “OK”. This will automatically upload the file to the appropriate location.
6. On the “Properties Form” which appears fill in any new information requested and click “Save”. The fields with asterisks are required to successfully upload a file (Note: most of this information is already filled in because SharePoint uses the information from the previous version).

How to set/remove an Alert on a Library, Folder, or Document:

To keep abreast of changes made to a site, an alert to be sent to your email address at chosen intervals can be set so you will be notified when files are created and/or changed.

If setting an alert for a library (such as tracking):

1. Navigate to the library you would like to be notified
2. In the Library Tab of the Microsoft ribbon which appears at the top of the page click on the Alarm button
3. Set the parameters as you would like.

If setting an alert for a folder (such as RFIs):

1. Navigate to the library of the folder about which you would like to be notified
2. Highlight the folder by clicking in the box which appears to the left of the name when you hover over the folder
3. In the Document Tab of the Microsoft ribbon which appears at the top of the page click on the Alarm button
4. Choose "set an alert on this document"
5. Set the parameters as you would like in the form and click ok

If setting an alert for a document (such as a Contractor Proposal):

1. Navigate to the folder of the document you would like to be notified
2. Highlight the document by clicking in the box which appears to the left of the name when you hover over the document
3. In the Document Tab of the Microsoft ribbon which appears at the top of the page click on the Alarm button
4. Choose "set an alert on this document"
5. Set the parameters as you would like in the form and click ok.

Note: Remember that if you set the alert for "immediate" you may receive many emails though out the day.

To remove an alert previously set:

1. Click on your username in the top right on any page of the site
2. Click on "my Settings"
3. Choose "my alerts"
4. Click in the box of the alerts you wish to remove
5. Click "Delete Selected Alerts".

Note: You can also change parameters for all your alerts on the site at this location by clicking on the name of the alert in the list. This will take you to the form to change parameters.

How to Set your Site to a Trusted Site for Better User Experience:

With an internet browser running:

1. At the top right corner there is a "Tools" menu.
2. At the bottom of the drop-down is "internet options".
3. "Security" is the second tab from the left.
4. In that tab, click the "Trusted sites" green check near the top.
5. Click the "sites" button (to the right a bit)
6. Click the "Add" button
7. Click "close"
8. Click "OK".

How to change your password:

Partners will need to change passwords every 60 days or 30 days of inactivity. “Change Password” is an option in the drop down menu by your username in the upper right hand corner of your SharePoint site. If your password expires you will need to change your password through the log in page.

To Change your Partner account password before it expires:

1. Click on your user name in the upper right hand corner to uncover the drop down menu
2. Choose “Change Password” in the list.
3. Enter your old password, your new password, and confirm your new password (note password rules below).
4. Click “Change”.

To Change your Partner account password if it has expired:

1. On the login page select the “here” link for password assistance
2. This will take you to a new page to begin the process to change your password.

Note:
You will need to know the email address associated with your account.
You will have 30 minutes to respond to an email which will be sent to that associated email address.
You will need to supply a correct answer to one of the security questions.
You will need to follow the same rules required when you created your previous password.

Password Rules:

- At least 12 characters
- At least 1 upper case and 1 lower case letter
- At least 1 special character (@,#,$,%,^,&,+,=,!)
- At least 1 number
- Cannot contain your name