

Saving Documents directly to SharePoint Document Library

- **Save documents directly into your document library**
- **Version control your documents**
- **Save metadata against a document**
- **Easily search for your document folder when saving**

Save documents directly into your Document Library in SharePoint

The ability for users of Microsoft's SharePoint Portal to save documents directly into their document library is a great addition to the functionality that SharePoint already provides. The SharePoint Solutions Centre offers a great SharePoint utility that allows users of SharePoint to save documents from the Office Suite of products directly into the Document Library.

The following brochure shows how this simple software ad-on can be used to make saving the right document into the right document library folder even easier and quicker than simple SharePoint allows for.

The new SharePoint menu will allow you to save your new document into the SharePoint Document Library, under the folder that you want.

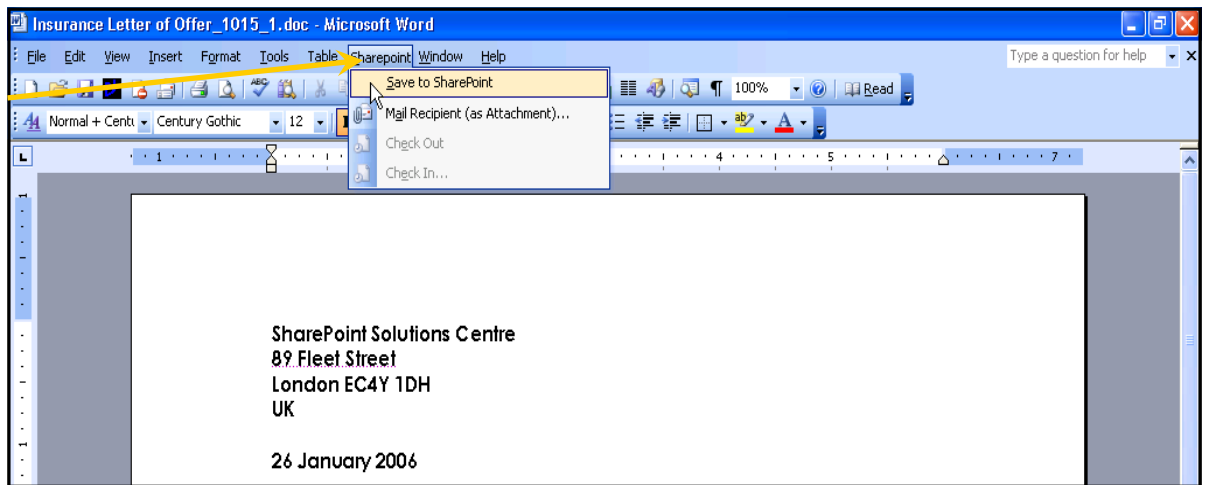


Figure 1.0 - Microsoft Word with SharePoint Solution Center's software add-in of the SharePoint menu tree, with the option to save directly in the SharePoint Document Library.

The simple addition of this software will allow for the creation of a SharePoint menu in your Office application and from here you can save directly into the document library.

Saving to SharePoint

A Save to Document Library profile form will pop up after selecting Save to SharePoint from the SharePoint Menu Tree.

In figure 2.0, we can see the simplest version of the profile form where all you have to do is to type in your File Name and then select the document folder you wish to save it to.

If you press on the Doc Folder button a new pop up will appear providing a search for your folders facility.

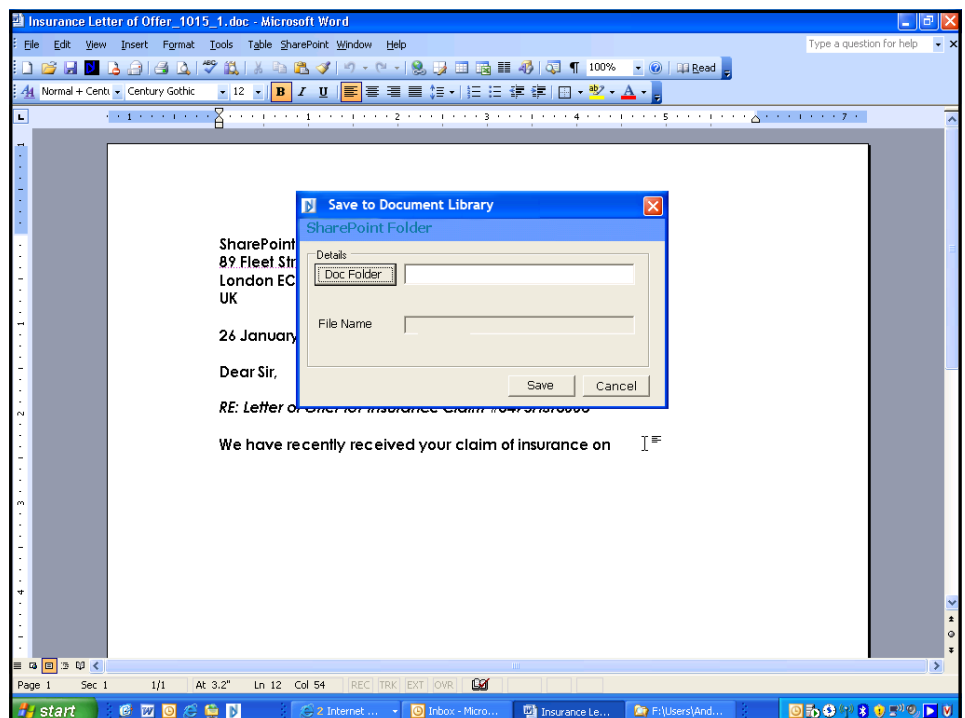


Figure 2.0 - Word document with the Save to Document Library profile form.

Save to Document Library profile screen

Figure 3.0 shows a close up of the Save to Document Library Profile form. From here you can type your file name and select the Doc Folder button which will allow for you to search for the folder using the Document Folder Lookup pop-up.

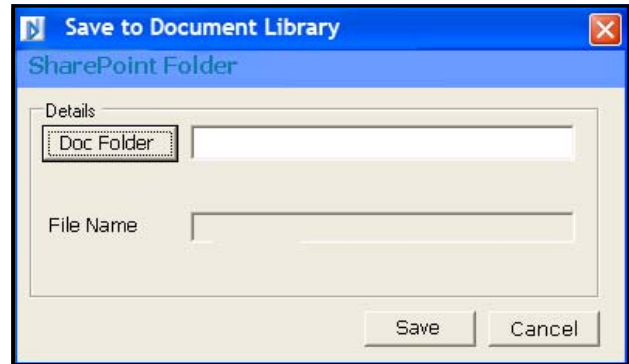


Figure 3.0 - Save to Document Library profile form.

Searching for document folders

Figure 4.0 shows the Document Folder Lookup screen. From this screen you can choose the Document Folder from the Document Library that you want.

If the Document Folder that you desire is not visible on the screen, then you can use the Search facility at the top of the screen. Here you can type in any of the text in the folder name and the search will produce the folder or folders that the text relates to.

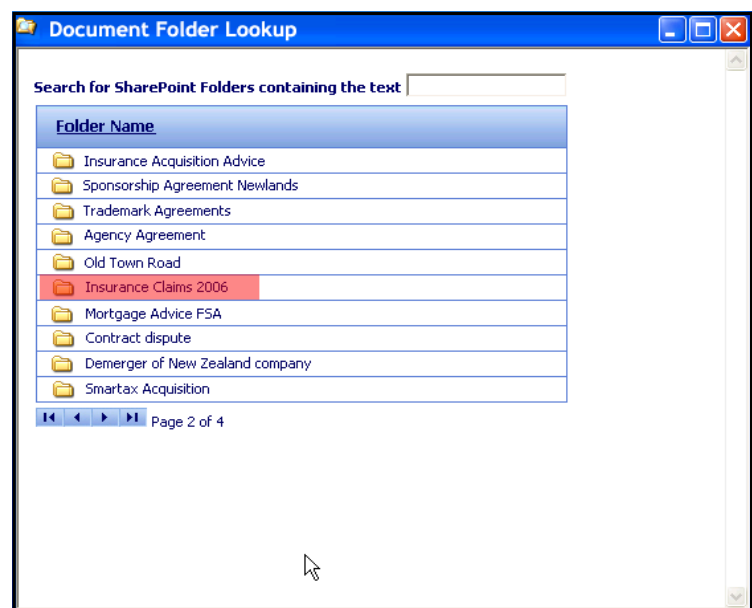


Figure 4.0 - Document Folder Lookup form.

Save meta data to your document

Figure 5.0 show the more advanced Save to Document Library profile screen that includes that ability for users of this add-in to save meta data against their document.

Meta data is extra fields in which you can save information about the document to.

This extra feature will allow you to save such things as the Document Type, Author, Typist and Status of the Document as well as any comments.

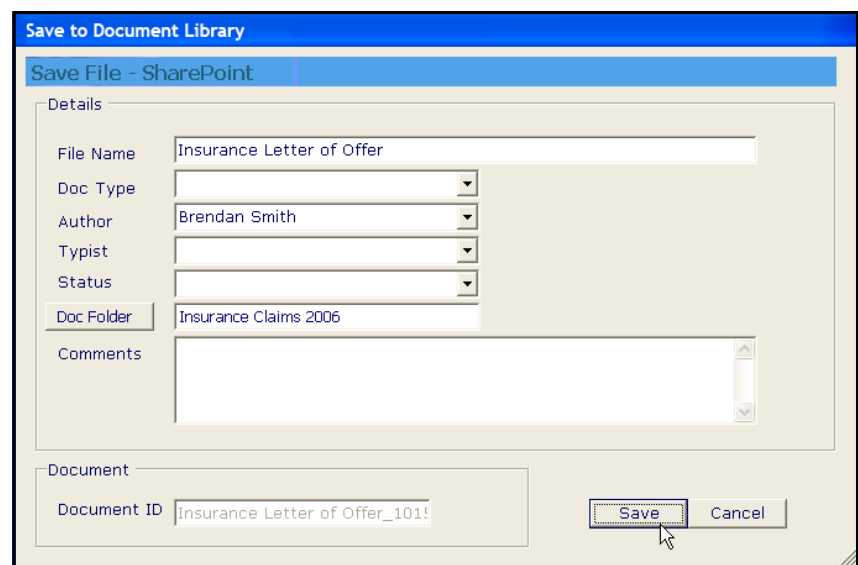


Figure 5.0 - Save to Document Library profile form with meta data capture.

Using Save to SharePoint feature

Figure 6.0 shows the full screen as a user would see it. The highlighted pink box is showing the document folder we wish to save the document to and would not normally appear.

In the background you can see the advanced *Save to Document Library* profile screen with the meta data fields in place.

Even if you have the advanced screen showing you do not need to fill in all the fields. The only compulsory fields are the File Name and the Doc Folder field.

By clicking on the document folder that you want, will automatically close the *Document Folder Lookup Screen* and will have the Doc Folder field in the *Save to Document Library* profile screen already filled out.

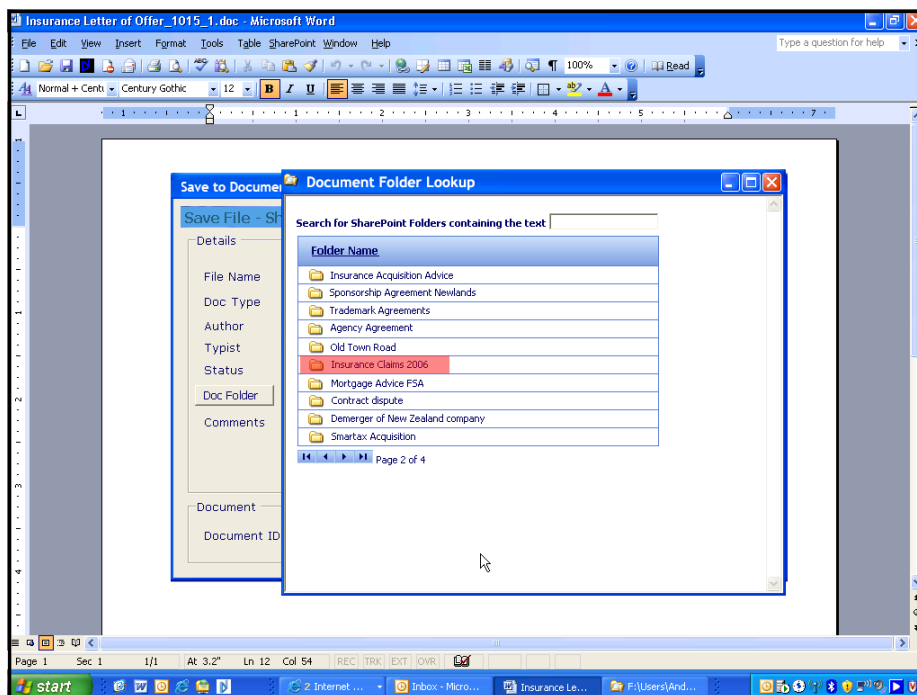


Figure 6.0 - Word document with the Save to Document Library Meta Data Screen as well as the Document Folder Look Up screen.

Versioning and version control

Figure 7.0 shows how you will be able to track the version number of each of your documents as you save them into your SharePoint Document Library.

When working in a document that has already been saved and you save via the SharePoint menu, you will be prompted to save the document as the next version in line. It will never overlap a previous version of the document even if you are working from the original document.

Alternatively you will have the option to create a new document from the one you are working in.

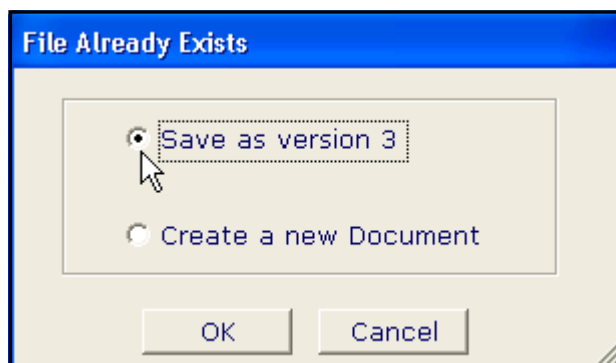


Figure 7.0 - Shows saving documents as different versions.

More from the SharePoint Solutions Centre



- Drag and drop your emails directly into SharePoint Document Library folders in your email account.
- Auto generate document folders under your inbox that you can drag emails into that will enter straight into your Document Library.
- Need to transfer documents straight into your Document Library? Try our simple document upload solution that will do it all automatically for you.
- Integrate Lotus Notes and Outlook straight into SharePoint.

Contact Details

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