Using the document library

Upon completing the steps in this set of instructions, you will have performed the following:

- Upload a document to the document library
- Find a document
- Replace a document
- Delete a document

Upload a document to the document library

Before you upload your document to the SharePoint library, make sure you have saved it with a short, descriptive web-friendly file name (see Page Design > Documents for more help). The file name of this example document (titled Guidebook for Patients) is patient-guidebook.pdf.

3	BC Cancer Agency CARE + RESEARCH Aligney (Mr Pointing Trends Surface)	
	Guidebook for Patients	
	Vancouver Centre	

In the editing site, navigate to your page.

BC Cance	er Agency		
Our Services	Health Info	Our Re	esearch
Our Services			Close
Directions & Parkin	g	+	
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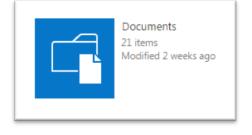
From the cogwheel, choose Site contents. (You do not need to go into Edit mode at this point.)



The Site Contents for your page will appear. Note that Site Contents look similar regardless of the page you are on. Check that you are in the correct Site Contents by looking at the URL bar. The address might not be exactly the same as your page, but it will be similar enough for you to confirm that you are in the correct Site Contents. If you are not in the correct Site Contents, you can either start again, or navigate to the correct library using the left menu.

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BC Cancer Agency	Our services • Health Info • Our Research • About • Contact Health Professionals • Donate Careers • Site Contents	Search.
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Directions & Parking Your Visit Centres & Clinics addt. proc	Sociments Ett Configuration App Ett Con	92 Pages 23 Jans: Madded 24 minutes ago

In the Site Contents, find the Documents icon and click it to open it.



The Document library for your page will appear. (You might want to check that you are in the correct Documents library by looking at the URL bar.)

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	August-VC-Support Programs-Calender	July 16, 2015	mmilosevic-02@bccancer.	bc.ca
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Click New Document. The Add a document pop up will appear.

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м	Add a document		×
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Click Choose File, navigate to where you have saved your document, and select it.

The document file name will appear in the Add a document pop up. Add version comments if you need to and click OK.

The Documents popup for your document will appear.

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	as uploaded successfully. Use this form to update the properties of the
document.	
Name *	patient-quidebook .pdf
Name	patient-guidebook .pdf
Title	Guidebook for Patients
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(interesting of the second sec	
ResourceType	
Resource Description	A complete guide for patients to the Vancouver Centre location of the BC Cancer Agency.
	T
Resource Language	Health Professionals
Resource Language Audience	
	Patients and Families
	Physicians
Audience Version: 1.0	Physicians Researchers
Audience Version: 1.0 Created at 20/05/2016 1	Physicians

The Document popup is the metadata record; it helps search engines find your content. Fill in the fields as follows:

- **Name** this field will show with the file name already in the field. If the file name is not the name you want, you must resave your document under the correct file name and re-upload it to SharePoint. If you change the file name in the Documents metadata popup you will create an error
- Title the full name of the document
- **Resource Category** click the little flag to the right of the field. When the Select Resource Category popup appears, navigate to the tag that describes your document, select it, and click OK.
- **ResourceType** this tag is being developed

- **Resource Description** add a brief sentence describing the content of the document
- **Resource Language** ignore this if the document is in English; if it is not in English, select the language of the document from the drop-down list
- Audience select the audience for the document (who it is written for)

Click Save. The Documents library for your page will appear, with your document added and a "new" icon beside it. Documents are added by file name in alphabetical order.

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ē		Name					Modified	Modified By
		2012_1	NewPat	tientBooklet_HalfLet	terForWeb		January 05, 2015	Chun.Yim@phsa.ca
		April-V	/C-Sup	port Programs-Cale	ndar		March 09	mmilosevic-02@bccancer.bc.ca
		Augus	t-VC-Si	upport Programs-Ca	lender		July 16, 2015	mmilosevic-02@bccancer.bc.ca
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	-	Cafete	riaMen	u20091			January 05, 2015	Chun.Yim@phsa.ca
	8	Copy	of July-	VC-Support Program	ns-Calender		June 24, 2015	mmilosevic-02@bccancer.bc.ca
	3	Copy	of July-	VC-Support Program	ns-Calender		May 28, 2015	dhass@bccancer.bc.ca
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	5	Octob	er-VC-S	Support Programs-C	alender.doc1		September 16, 2015	mmilosevic-02@bccancer.bc.ca
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	2	Septer	mber-V	C-Support Program	s-Calender.doc1		August 21, 2015	mmilosevic-02@bccancer.bc.ca

Find a document

Find a document in the Site Contents In the editing site, navigate to your page.

BC Canco	er Agency						
Our Services	Health Info	Our Re	esearch				
Our Services							
Directions & Parkin	g	+					
Your Visit							
Services		+					
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Regional Centre s	ample page						
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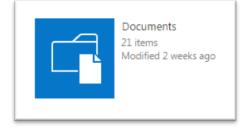
From the cogwheel, choose Site contents. (You do not need to go into Edit mode at this point.)



The Site Contents for your page will appear. Note that Site Contents pages look similar regardless of the page you are editing. You can check that you are in the correct Site Contents by looking at the URL bar. (The address might not be exactly the same as your page, but it will be similar enough for you to confirm that you are in the correct Site Contents.) If you are not in the correct Site Contents, you can either start again, or navigate to the correct library using the left menu.

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Directions & Parking Your Visit Centres & Clinics eath. Into	add an app Documents. 21 lens. 2	es lans. Séed 24 minutes ago

In the Site Contents, find the Documents icon and click it to open it.



The Document library for your page will appear. (You might want to check that you are in the correct Documents library by looking at the URL bar.)

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linics	2012_NewPatientBooklet_HalfLetterForWeb	January 05, 2015	Chun.Yim@phsa.ca	
	April-VC-Support Programs-Calendar	··· March 09	mmilosevic-02@bccancer.bo	t.ca
ncer	August-VC-Support Programs-Calender	••• July 16, 2015	mmilosevic-02@bccancer.be	ca
	BCCAContactNumbers	January 05, 2015	Chun.Yim@phsa.ca	

Documents are listed in the Documents library alphabetically by file name. Look for the file name of your document. If there are many documents in your Documents library, you might need to scroll through pages. Click the right arrow at the bottom of the list on each page to scroll through pages.

10	Disclosing Your Cancer Experience at Work	 April 08, 2015	HCFWNZZVFMD4-153-13
20	Emotional Health and Cancer Brochure	 March 11	HCFWNZZVFMD4-153-188
	EvaluationforPatients	 June 04, 2015	HCFWNZZVFMD4-153-157
10	Evaluation for Professionals 1	 June 04, 2015	HCFWNZZVFMD4-153-158
	ExplainginDifftTypes_of_CancerTx	 February 11, 2015	HCFWNZZVFMD4-153-12
	Financial Assistance for Prescription Drugs Traditional Chinese FINAL	 May 01, 2015	HCFWNZZVFMD4-153-142
10	Financial Assistance for Prescription Drugs2016	 March 01	HCFWNZZVFMD4-153-184
ell'	Financial Information for Cancer Patients 2015Web	 February 11, 2015	HCFWNZZVFMD4-153-114

Documents are listed with an icon showing what kind of document it is, the document file name, an ellipsis (when clicked, a menu of options pops up), and the date the document was last modified and by whom.

	patient-guidebook	 5 days ago	□ theresa.best@phsa.ca
H			

Find a document by file name or keyword

You can also find a document by searching by file name or keyword.

To search by file name, enter the document file name into the main site search tool.



If a document by that file name exists, the search result will display name of the site in which the document has been placed.

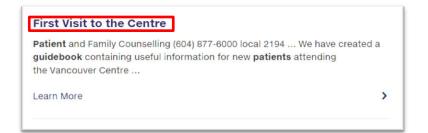
3C Cancer Age	ncy:						
? results	Centre - Vancouver Centre site - Documents						
	Copy of July-VC-Support Programs-Calender 24/06/2015 3:28 PM mmilosevic- 02@bccancer.bc.ca patient-guidebook 20/05/2016 3:29 PM theresa.best@phsa.ca						
	Learn More >						

You can then navigate to that site in the site contents to find your document.

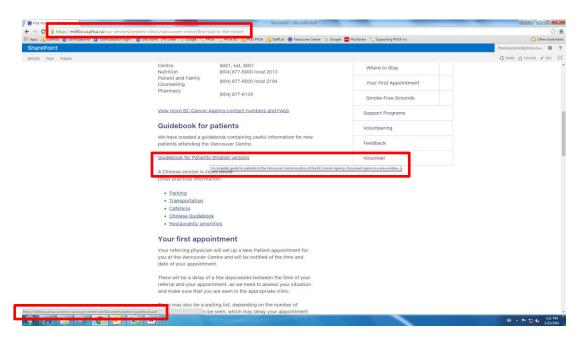
To search by key word, enter the key word into the main site search tool.

Follow us	9	patient guidebook	Q
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The search result will display the names of pages that contain the key word or key words.



Click on the page title to open the page, and look through the page to see if your document has been placed on it. When you hover over a document link, the url of the document appears in the bottom of your screen, and the metadata for the document will appear. Both of these pieces of information should be able to help you decide if this is the document you are looking for. If this is the right document, look at the url bar to see its location.



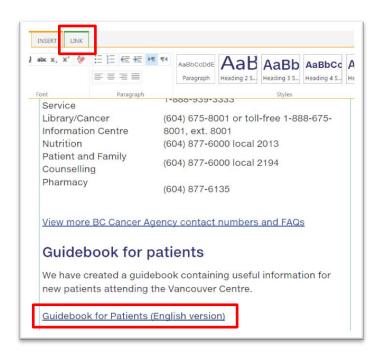
Replace a document

Sometimes you need to replace an out-of-date document with an updated version of the same document.

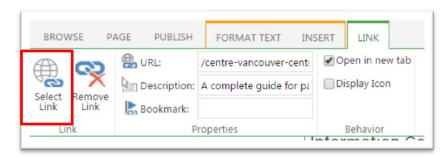
You can upload a new version of a document and link to the document in a single series of steps. However, your old document **must** have exactly the same name as your old document. For example, if you have updated an old document called **clinic-referral-form.doc** you must save your new document on your desktop first, with exactly the same file name **clinic-referral-form.doc** in order to make the replace a document process work correctly in Sharepoint.

- If your new document has exactly the same file name as your old document, Sharepoint will automatically put the new document in the old document's place (including attaching it to the existing document record), and all links to the old document will not break.
- If your new document has a different file name, Sharepoint will upload a separate document (including creating a new document record), and all links to the old document will break.

In the editing site, navigate to your page. Place your cursor on the link to the document that you want to replace. In this screenshot, the link is <u>Guidebook for Patients (English version</u>). The green Link tab will appear. Click the tab.



In the Link tab, click Select Link.



The Select an Asset panel for your Documents library will appear. Check that you are in the correct site (by looking at the Current Location line at the top of the page). Click "Click to <u>add</u> new item" at the top of the panel. The Add a document panel will appear. Navigate to the item on your desktop, select it and click OK. The document record for your document will appear, with the Name (document file name) and Title (document title) fields filled in. Click Save.

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same "	using-document-library	.pdf	
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/enion: 0.3 Createst #/25/2016-846 PM. by □ TheresaBest@phiaca Last modified at 8/20/2018-202 PM. by □ TheresaBest@phiaca			Save Cancel

The Select an Asset panel will appear. Navigate to the document you just uploaded. In this screenshot, the document is **using-document-library.pdf**. (The Modified column indicates when the document was uploaded.)

Select your new document. The document will appear in the Location (URL) field. Click Insert.

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	* 31-53					

The new document will appear on the document link on your page.

Delete a document

To delete a document from the library, go the Site Contents for your section. Find the document you want to delete. In this example, I want to delete: 2012_newPatientBooklet_HalfLetterForWeb.

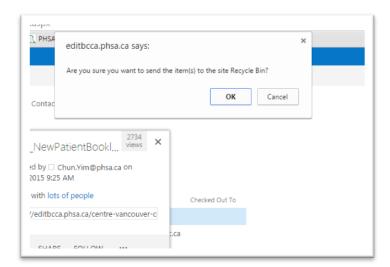
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	quit-now-referral-form	April 22	🗆 theresa.best@phsa.ca
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Resources	SuggestionsComments	+++ January 05, 2015	Chun.Yim@phsa.ca

Click the ellipsis to the right of the document file name. The document record will pop up.

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	pdf	march-vc-sunnort-nroorams-calendar		March 12, 2015	snennington	-02@hccancer.hc.ca	

Click the ellipsis in the bottom right of the document record popup. In the drop-down menu that appears, click Delete.

SharePoint will ask you if you are sure. If you are, click OK.



The document will be moved to the Recycle Bin.