Editing Documents in a SharePoint Library

To edit a document in SharePoint you must have edit permissions to the library.

1. Open the document library by double clicking on it.
2. Check out the document you want to edit, this prevents other users from making changes to the document while you are making changes.
   a. Move your mouse over the document you wish to check out.
   b. Use the down arrow that appears to the right of the document and select Check Out.
   c. Select Use my local draft folder.
   d. Click OK.
   e. A green arrow will appear on the document, when someone moves their mouse over it they will be able to see who has it checked out. They will not be able to modify the document but they can still look at it. The changes you make are not visible until you check the document back in.
3. Move your mouse over the document name and use the arrow that appears on the right to select Edit in program name (where program name is the name of the program the document is in, like Word, Excel or PowerPoint).
5. When you are finished making your changes click on the Office Bubble in the program you are using.
6. Select Server and then Check In. To check the document back into SharePoint with the changes you have made.
7. If the versions feature has been turned on in the library you will be prompted to enter comments about the changes you made.
8. To see the version history of a document move your mouse over the document, click the down arrow and select Version History.
9. You can restore a previous version by moving your mouse over it and using the down arrow to select Restore.