



## Document Management

With the migration to SharePoint 2016, you can now create multiple versions of the same document and restore documents to their original version! Find more tips for document management below!

### Create a new document

1. In the left navigation pane, click Documents.
2. Click the Files tab.
3. In the New group, click the New Document dropdown.
4. Select New Document.
5. If a warning pop-up window displays, click Yes or Launch Application, depending on your browser.

### Edit a document

1. In the left navigation pane, locate and select the appropriate list or library.
2. Locate and select the file you want to edit.
3. Click the Open Menu icon.
4. Click Edit.
5. Make the appropriate changes.
6. To save your changes, click Save.
7. To close the document, click Close.

### Publish a document

1. Note: To publish and unpublish documents you must have the major and minor versions settings turned On.
2. In the left navigation pane, select Documents.
3. In the Documents list, select the appropriate document.
4. Select the Files tab.
5. In the Workflows group, select the Publish icon.
6. In the Comments field, enter the appropriate information.
7. Click OK.

### Upload a document

1. From the site page, locate and select the appropriate list or library that you would like to upload the document in.
2. In the Document Library area, click Upload.
3. Click Choose File.
4. Locate and select the appropriate file.
5. Click Open.

*If you need more help, please reach out to your division's FSSA Super User or send an email to [SharepointRequests@fssa.in.gov](mailto:SharepointRequests@fssa.in.gov) with a description of your issue.*



6. Click OK.
7. Depending on your browser, you may also be able to click and drag files directly into the document list.

### Download a copy of a document

1. In the left navigation pane, locate and select the appropriate list or library.
2. Select the appropriate document to download.
3. Select the Files or Items tab.
4. In the Copies group, select Download A Copy.

### Create a new version each time an item is edited

1. From the site page, click the Settings icon
2. Click Site Contents.
3. Next to the appropriate app, select the Click For More Information icon.
4. Click Settings.
5. Under General Settings, select Versioning Settings.
6. Locate the Document Version History area.
7. In the Create A Version Each Time You Edit A File In This Document Library? area, select the appropriate option radio button.
8. To set the number of major versions, select the Keep The Following Number Of Major Versions checkbox.
9. In the Versions field, enter the appropriate number.
10. To set the number of drafts for major versions, select the Keep Drafts For The Following Number Of Major Versions checkbox.
11. Click OK.

### Restore a document to its original version

1. In the Quick Launch, the Home page, or under Site Content, open the appropriate library.
2. Under All Documents, select the appropriate document.
3. Click the Open Menu icon.
4. Click the More Actions icon.
5. Select Version History.
6. In the Version History window, click the Modified drop-down of the version that you want to restore.
7. Select Restore.
8. Click OK.
9. Please note that when an original document is restored, it does not replace the latest version of the document. Instead, a new version that is identical to the original one is created.

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