

UPLOAD A DOCUMENT TO MY DOCUMENTS IN INFOSHARE

Here are some instructions on how to set up your My Documents library. The My Document library is essentially your own document library in InfoShare. As we migrate away from network drives like the G: and I: drives, you can use the My Documents tab in InfoShare to hold your personal I: drive documents. These documents are saved under your profile in InfoShare and are not accessible to anyone else, unless you place them in your Share with Everyone folder or manually share them with specific users.

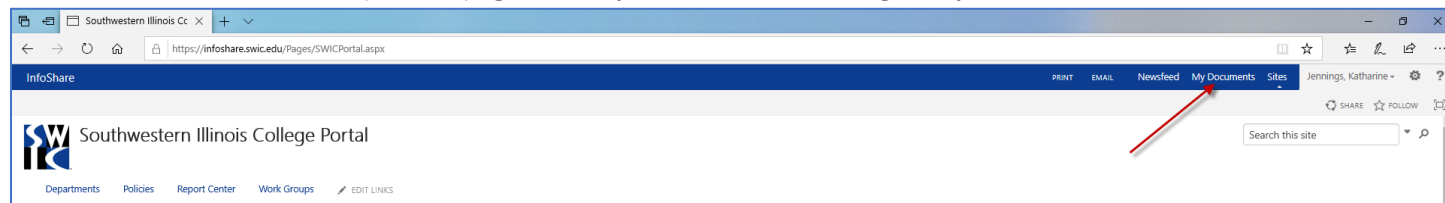
Note* - when uploading your I: documents into InfoShare, please remember, My Documents are for SWIC business related documents ONLY. We will be limited in the space we have available to all SWIC staff and faculty who will be storing documents here, please only upload your necessary documents and be mindful in how much server space you are utilizing. Please, refrain from uploading unneeded pictures, videos and other files large in size. If you do need a place to store video files, multiple PowerPoint presentations or other large files, please contact Katharine Jennings at katharine.jennings@swic.edu or your IT Functional Analyst and we will come up with another option for you. Thank you for your understanding.*

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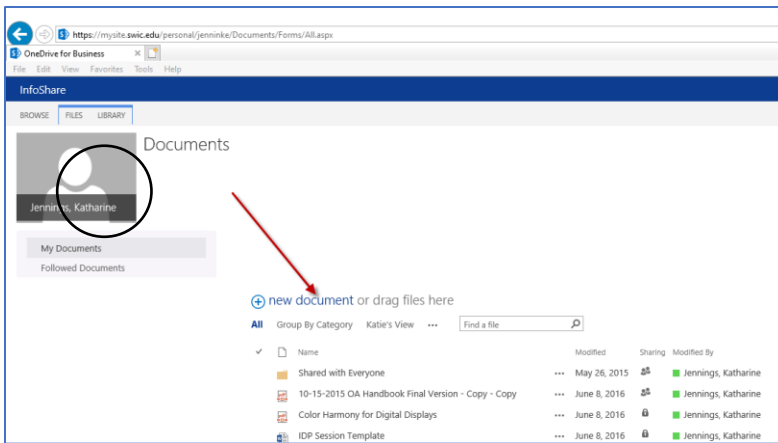
ADDING YOUR DOCUMENTS TO MY DOCUMENTS

1. Go to InfoShare.swic.edu
2. On the blue bar at the top of the page, click My Documents on the right of your screen



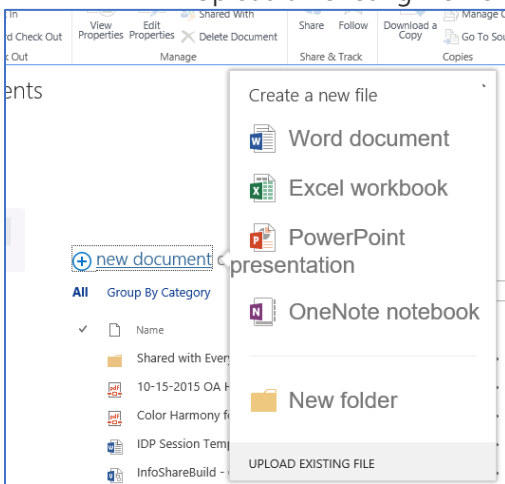
This takes you to your My Documents Library.

3. To upload an existing document from your SWIC PC or I: -Click **+ new document**

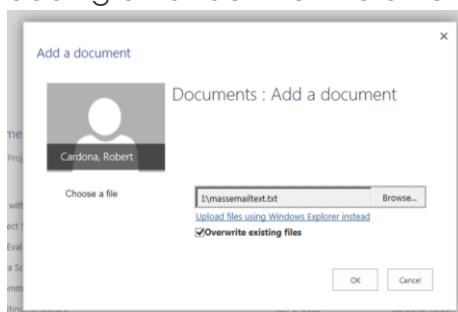


On this dialog, you can choose to

- Create a new Word, Excel, PowerPoint, One Note file
- Create a new Folder to organize your documents
- Upload an existing file from your local PC or network drive.



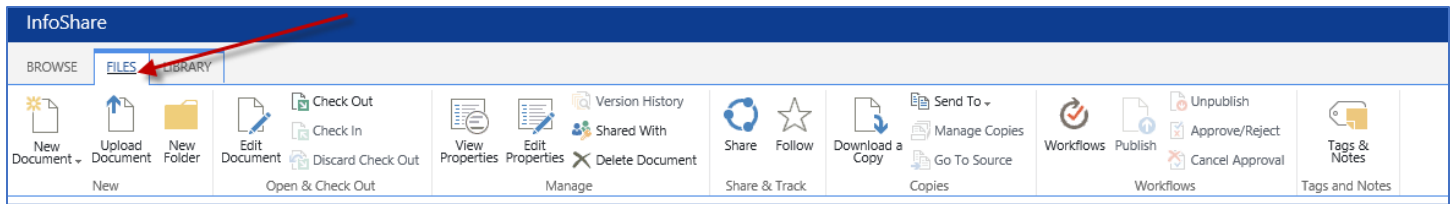
4. To upload an existing file: **Choose Upload existing file.**
5. Click **Browse** and navigate to your file on your computer (I: drive) and select Open. (just like you are adding an attachment to an email.)



6. The path to your file will be displayed in the box next to Browse.
7. You can leave the Overwrite existing files checked.
8. Click **OK**.

FILES RIBBON

At the top of the page, you can click on the FILES tab to display the FILES ribbon. Here are a few additional options that you can do in your My Documents.



After the documents have been uploaded to your My Documents. You can log into InfoShare from off campus, click on My Documents link at the top right of your screen and your documents will be available to you.

See the next pages for more advanced options for managing your My Documents, including sharing and organizing your My Documents with Columns and Metadata.

FOR MORE ADVANCED ORGANIZING OF YOUR DOCUMENTS USING METADATA AND TAGS

Before moving documents into your My Documents library, there is some planning that should be done to organize your documents so you can retrieve them quickly. Follow these steps below:

1. Remove old documents that you no longer need from your I: drive. Removing old files cluttering your I: drive is an important first step.
2. Consider the files you have in your I: drive and determine what you really need to move over to InfoShare. Some individuals may keep personal files that aren't related to the college or their specific job like personal pictures, favorite recipes, etc. These should not be moved to InfoShare.
3. Next, rename your files that you will be moving to InfoShare using the InfoShare Naming Convention (see page 15). The instructions below will explain why you should consider using a naming convention for your files.
4. Now, take some time to plan how you will organize the documents in InfoShare. Remember we are not using folders in InfoShare but your I: drive folder names may be a good way to tag your documents and organize them. Remember, you can think of tags as folders and subfolder names. You can use a structure like the one below to come up with a plan. On page 11 is a template you can print out and use to develop your own file plan.

Column/Tag Worksheet

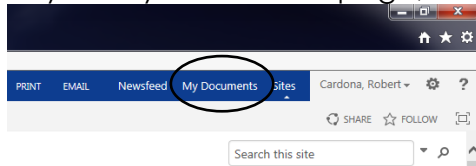
Column 1 Name MyTopics	Column 2 Name DocType	Column 3 Name ???? (If needed)
Tags for Column 1	Tags for Column 2	Tags for Column 3
Admin	Backup's	
Data Management	Bundle Testing	
IT	Image Stuff	
Project Success	Lab Computers	
TutorTrac	Meetings	
Other	Reports	
	Schedule Changes	

	Staff Computers	
--	-----------------	--

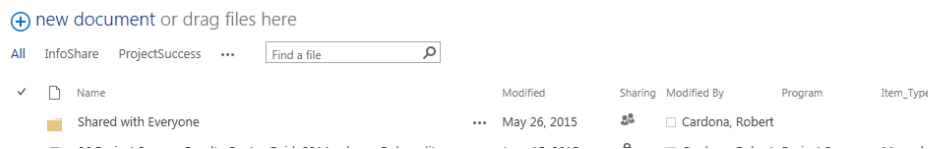
Once you develop a file structure, you can now build your My Document library.

CREATING COLUMNS FOR YOUR MY DOCUMENTS LIBRARY

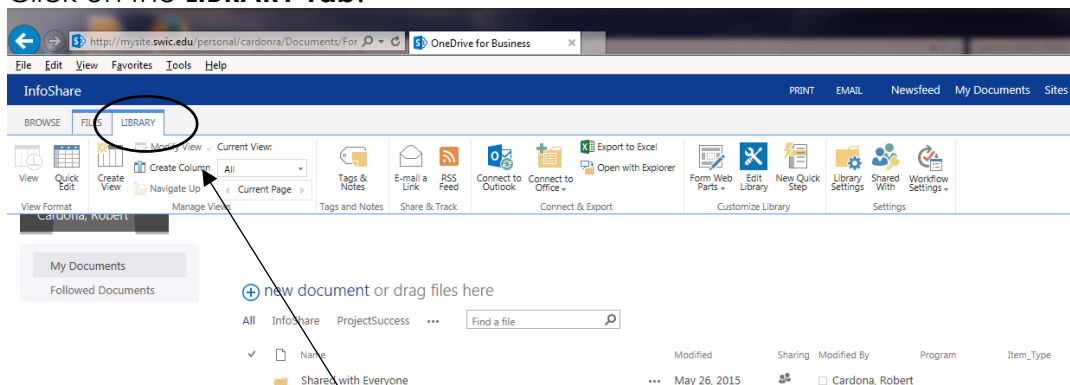
1. To get to your My Documents page, click on My Documents.



2. This is a page is where you can keep your personal documents. These documents are not accessible to anyone else, unless you place them in your **Share with Everyone** folder or manually share them with specific users.

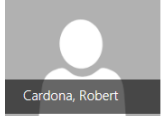


3. Before you add your I: drive documents, let's add your column headings and tags.
4. Click on the **LIBRARY Tab**.



5. Select **Create Column**.
A window will display like the one below. Fill in the **Column name:** with the 1st column heading you want to use.

Settings > Create Column ⓘ



Cardona, Robert

Name and Type
Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☒ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, €, £)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (checkbox)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ Task Outcome
- ☐ External Data
- ☐ Managed Metadata

- Below the column name are a series of radio buttons. Click on **Choice (menu to choose from)**. This will allow you to build a list of tags to choose from.
- Scroll down to see the remaining column settings.

Create Column

Additional Column Settings
Specify detailed options for the type of information you selected.

☐ Managed Metadata

Description:

Require that this column contains information:
☒ Yes ☐ No

Enforce unique values:
☐ Yes ☒ No

Type each choice on a separate line:

Display choices using:
☒ Drop-Down Menu
☐ Radio Buttons
☐ Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:
☐ Yes ☒ No

Default value:
☒ Choice ☐ Calculated Value

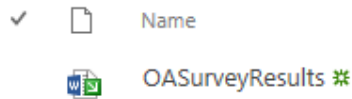
Column Validation

OK

Cancel

- You do not need to provide a description since you are the only one that will use this library; however, you can if you want too.
- Require that this column contain information** defaults to **No**. You can leave this as **No** which will allow you to save/move documents into this library without assigning tags right away. This can be helpful if you have a lot of documents to move but you don't want to tag each one as you move them over. If you select **Yes**, you may be prompted to tag each document as you save/move them into the library unless you assign a default value (explained below). However, I would recommend that at some point you have at least one column required to prompt you to assign the correct tags.
- Leave **No** selected on **Enforce unique values**.

11. In the box below **Type each choice on a separate line:** go ahead and type in the tags you came up with for your 1st column. They will display on the list in the order that you type them.
12. On **Display choices using:** go ahead and leave as a **Drop-Down Menu**. If you want to use multiple tags you can select **Checkboxes (allow multiple selections)**.
13. For **Allow Fill-in** choices leave as **No**.
14. For **Default value:** you can leave on **Choice** and type in a default value if you want. Providing a default value will then tag every document with this tag when you save/move a new document into the library. You will need to go into the document properties (explained on page 5) and change it to the appropriate tag if needed. If you do not assign a default value, when you add a document, your document will display as checked out (see image below) until you assign the appropriate tags.



You will need to go into the document properties and assign a tag and then check the document in.

15. If you have a check box with **Add to default view** leave the box checked.
16. Click the OK button.

Repeat steps 4 thru 15 if you want to add additional columns.


If you want to make change to the columns you created such as add or remove additional tags, see [ADDING ADDITIONAL TAGS TO A COLUMN](#) below.

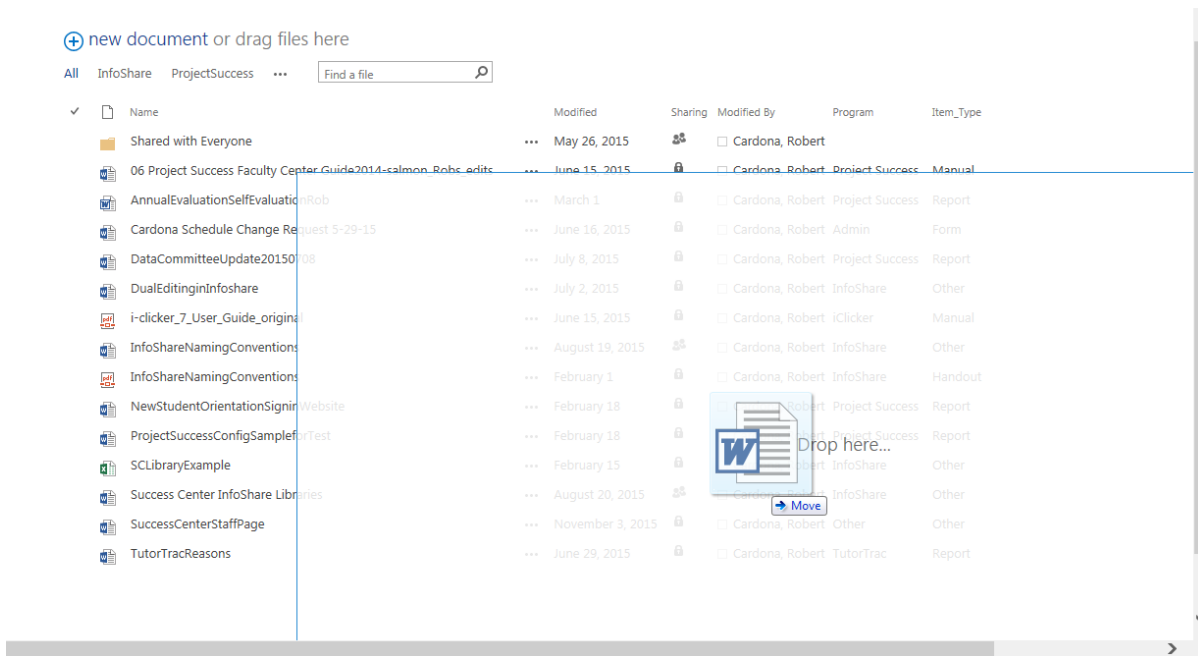
Once you are done adding the columns you need, you can now move your files to InfoShare.

ADDING FILE(S) TO MY DOCUMENTS

There are different ways to add files to a library depending on if you are creating new documents, uploading a single document, or uploading multiple documents. Here are a couple of ways to add files from your I: drive:

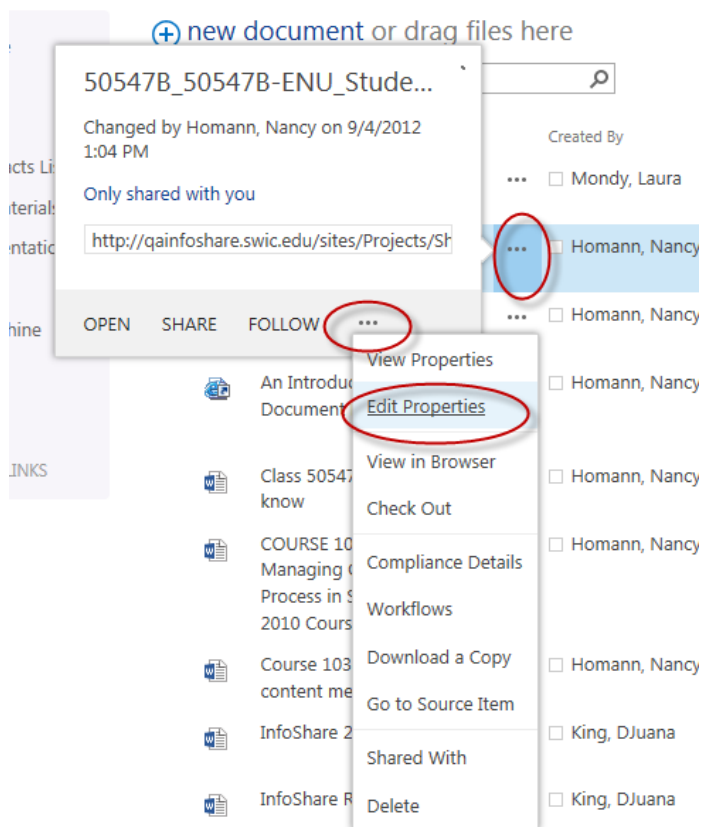
Drag and Drop files to Library. On Sharepoint 2013, you can use the Drag and Drop feature to add file(s) to your Document Library. Grab the file from your local computer and drag it over to the document library area.

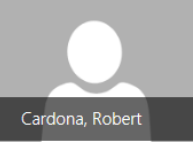
A 'white box' will appear once you have dragged your document over the page. It is safe to drop your file once you see  appear.



You will then have to EDIT the document properties to fill out all the Metadata information.

1. To edit the properties of the document, click on the ellipses (...).
2. Click on the 2nd ellipses, then choose **Edit Properties**.





Cardona, Robert

Documents

- Newsfeed
- About me
- Blog
- Apps
- Tasks
- Recent
- Documents

EDIT LINKS

Name * .docx

Title

Program *

Item_Type

Created at 7/2/2015 12:48 PM by ☐ Cardona, Robert

Last modified at 7/8/2015 10:43 AM by ☐ Cardona, Robert

Save Cancel

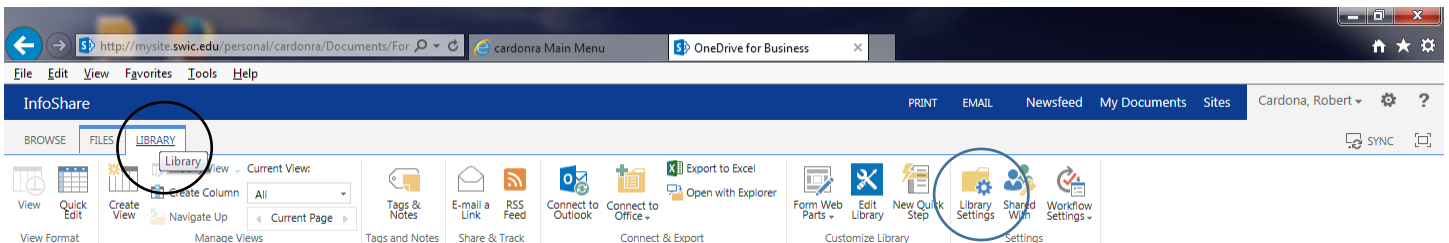
Fill out the properties and ensure you give it a **Title** and use the appropriate tags you've identified to associate to this document.

You can grab multiple files at a time and drag and drop them into your library. Keep in mind you will have to go into the properties of each one to update the metadata information.

ADDING ADDITIONAL TAGS TO A COLUMN

At some point you may realize that you want to add an additional tag to one of your existing columns. To do this follow these steps:

1. First **Click** on the **Library Tab** and then click on **Library Settings**.



2. The window below will display. Under the Columns heading you will find your list of columns. Identify the one you want to add additional tags to and click on the column name. (In the example below, the column name is Program).

List Information

Name: Documents
Web Address: http://mysite.swic.edu/personal/cardonra/Documents/Forms/All.aspx
Description:

General Settings Permissions and Management Communications

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Column default value settings
- Audience targeting settings
- Rating settings
- Form settings

Permissions and Management

- Permissions for this document library
- Manage files which have no checked in version
- Enterprise Metadata and Keywords Settings

Communications

- RSS settings

Columns

A column stores information about each document in the document library. The following columns are currently available in this document library:

Column (click to edit)	Type	Required
Title	Single line of text	
Program	Choice	✓
Is my documents	Yes/No	
Shared With Internal	Person or Group	
Item_Type	Choice	
Created	Date and Time	
Modified	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

3. **Click** on your column heading and it will take you back to your column settings.

Settings ▸ Edit Column ⓘ

Name and Type

Type a name for this column.

Column name:

The type of information in this column is:

☐ Single line of text
☐ Multiple lines of text
☒ Choice (menu to choose from)
☐ Number (1, 1.0, 100)
☐ Currency (\$, ¥, €)
☐ Date and Time

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

☐ Yes ☒ No

Enforce unique values:

☐ Yes ☒ No

Type each choice on a separate line:

- From the Edit Column view you can change your column heading if you want or you can add additional tags in the **Type each choice on a separate line:** box area and click **Ok** at the bottom of the page.

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
☐ Yes ☒ No

Enforce unique values:
☐ Yes ☒ No

Type each choice on a separate line:

Access Database
 Athletes
 AQIP
 Committee
 HelpDesk

Display choices using:
☐ Drop-Down Menu
☐ Radio Buttons
☒ Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:
☐ Yes ☒ No

Default value:
☒ Choice ☐ Calculated Value

Delete OK Cancel

- You can also remove tags that you no longer want in this box by backspacing over them or selecting and hitting the delete key on your keyboard. Make sure you remove any blank spaces between your tags.
- If you decide you don't want the column or tags at all, scroll down to the bottom and select **Delete**. This will remove the column and the associated tags.

SHARING FILES IN YOUR MY DOCUMENTS

- To share a document, click on the ellipses (...).
- Click on **SHARE**.

AnnualEvaluationSelfEvaluationRob.doc

Annual Evaluation
Self Evaluation

Please answer the following questions in preparation for your annual evaluation, which needs to be submitted this week. Please, let us have a good time for you to have the evaluation. If possible, please give me your responses to the self-evaluation by March 22. Thank you.

1. In your view, how do your responsibilities support the Success Center's mission?

I believe my responsibilities have a significant impact to the mission of the Success Center. I believe our site provides an excellent and successful, program and have the necessary software applications available for student to utilize. The staff have made the necessary changes to the computer system to allow our staff to be able to provide the necessary services to the students.

PAGE 1 OF 2

Changed by you on 3/1/2016 1:31 PM

Shared with ☐ SP_farmadmin_pr

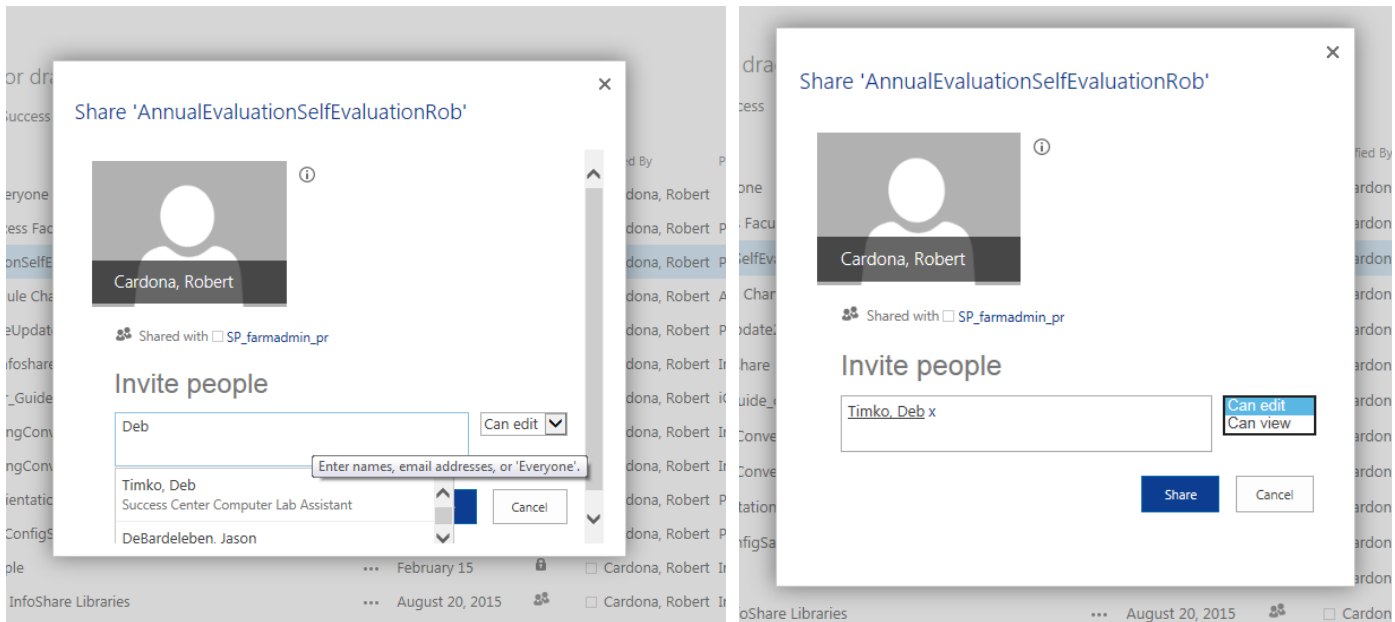
<http://mysite.swic.edu/personal/cardonra/Documents/AnnualEvaluat>

EDIT SHARE FOLLOW ...

February 1 Cardona, Robert Infoshare Handout

February 18 Cardona, Robert Project Success Report

- The window below will pop up. You can start typing in a name and the directory will look up the name of the person you want to share it with. Choose their name from the list.
- Next, you can choose if you want the person you are sharing it with to only view it or be able to edit it as well.

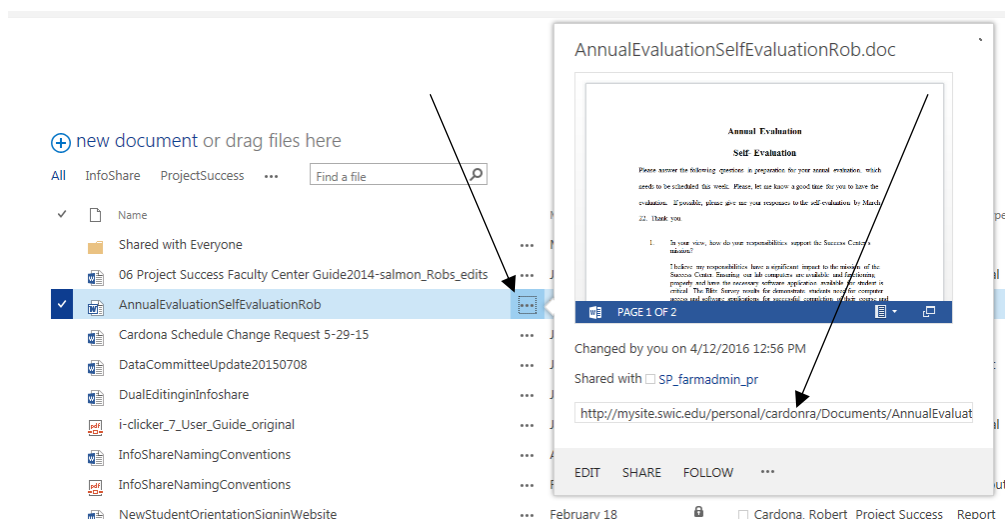


- Once you have selected the option to share it with someone, click **Share**.

Now although you have "Shared" this document, the person you shared it with will not know unless you send them an email with the link to the document.

To send them the link to your document, open Outlook and select New Email and add your recipient(s).

Now click on the ellipse of the document you are sharing and copy the hyperlink to the document. Paste this link in your email and click Send in your Outlook email.

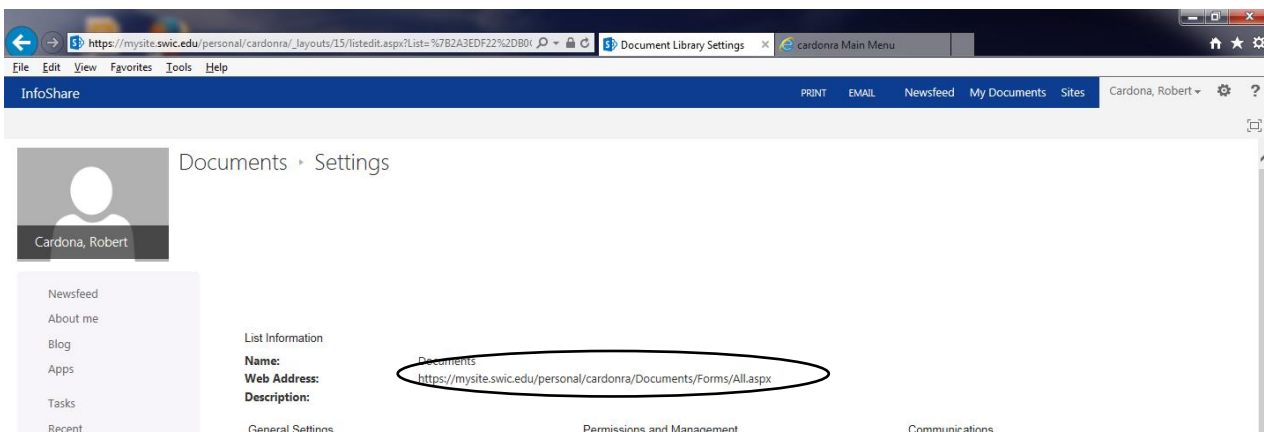
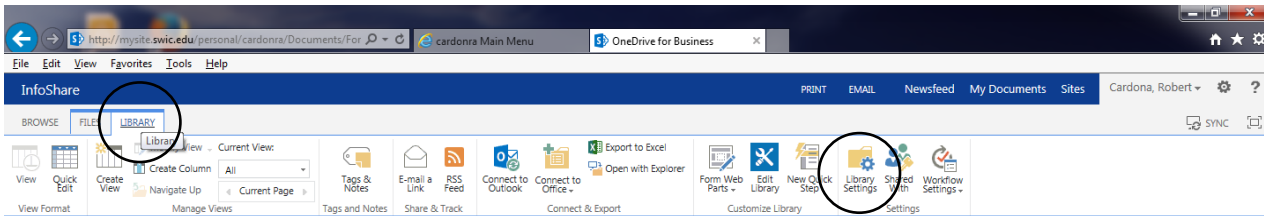


SETTING UP A MY DOCUMENTS LINK ON YOUR ABOUT ME PAGE

Another way to share your document is to set up your About Me page with a link to your My Documents. This will allow anyone to see what documents you've shared with them by going to your About Me page and click on the link you created.

Follow these steps below:

From your My Documents, click on the Library tab and select Library settings.

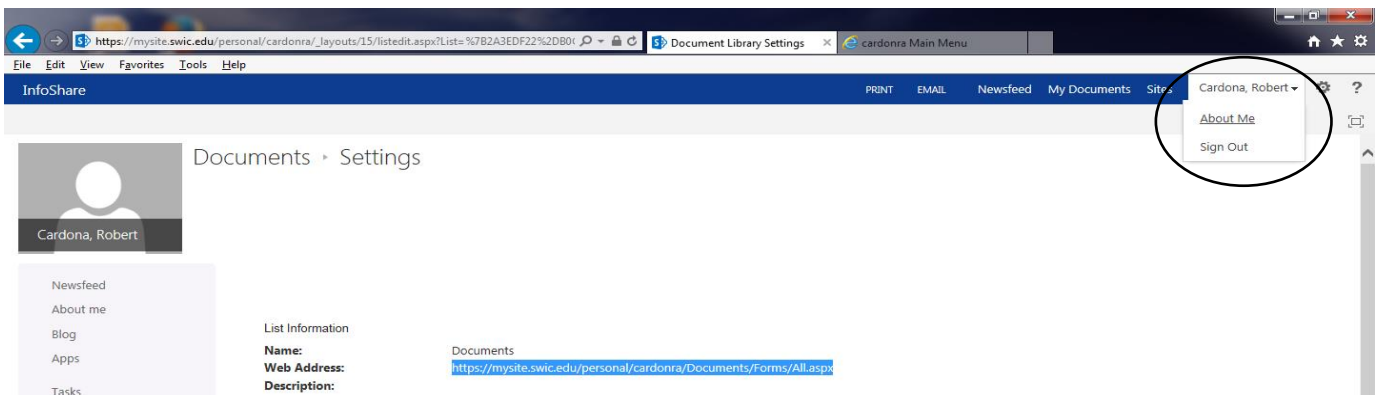


Note the **Web Address** heading provide which contains URL to your My Documents.

Highlight and copy this URL.

Next go to your name on the far right and click on your name.

Select **About Me** from the dropdown.



On your About Me page, look at the bottom right and select Add Link.

Browser window showing the InfoShare profile page for Robert Cardona. The page includes a search bar, a profile picture, and sections for "About Cardona, Robert", "Useful Links", "My Links", "Colleagues", and "Document Libraries". The "Add Link" button is circled in the "My Links" section.

Browser window showing the InfoShare profile page for Robert Cardona. The page includes a search bar, a profile picture, and sections for "About Cardona, Robert", "Useful Links", "My Links", "Colleagues", and "Document Libraries". The "Add Link" button is circled in the "My Links" section.

Browser window showing the "Add Link" page. The page includes a search bar, a profile picture, and sections for "Link Information", "Add to Group", and "Show to". The "Title" and "Address" fields are circled, and the "Add to a Group" section shows the "Existing group" option selected.

Use this page to add a link to My Site.

* Indicates a required field

Link Information

Enter the title and address of the link.

Add to Group

Use these options to organize your links by adding them to appropriate groups.

Show to

Choose who can view these links. The privacy setting you select here affects who can see these links when they visit your profile.

Title: *

Address: *

Add to a Group:

☒ Existing group: General

☐ New group:

Show these links to:

Everyone

OK Cancel

On the Add Link page, fill in a title like "Your Name" Documents (Ex. Rob's Document). Delete what is in the address block and paste the link you copied from your My Documents page.

Leave the **Add to a Group** as is and the **Show these links to:** defaulted to Everyone. Everyone will be able to see this link on your About Me page but only those you've shared documents with will get to see the documents you shared.

File/Tag Worksheet

Column Heading 1

Column Heading 2

Column Heading 3

TAGS for

1st column

2nd column

3rd column
