

# External SharePoint– Document Management

The External SharePoint site is the heart of every project as it is the main document management system, allowing inhouse and external experts to collaborate.

Here you can work with your project documents and edit and share the documents with other project participants and collaborators on your project.

This guide describes in small steps how to work with documents in External SharePoint.

## NIRAS Share



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# Registration and login

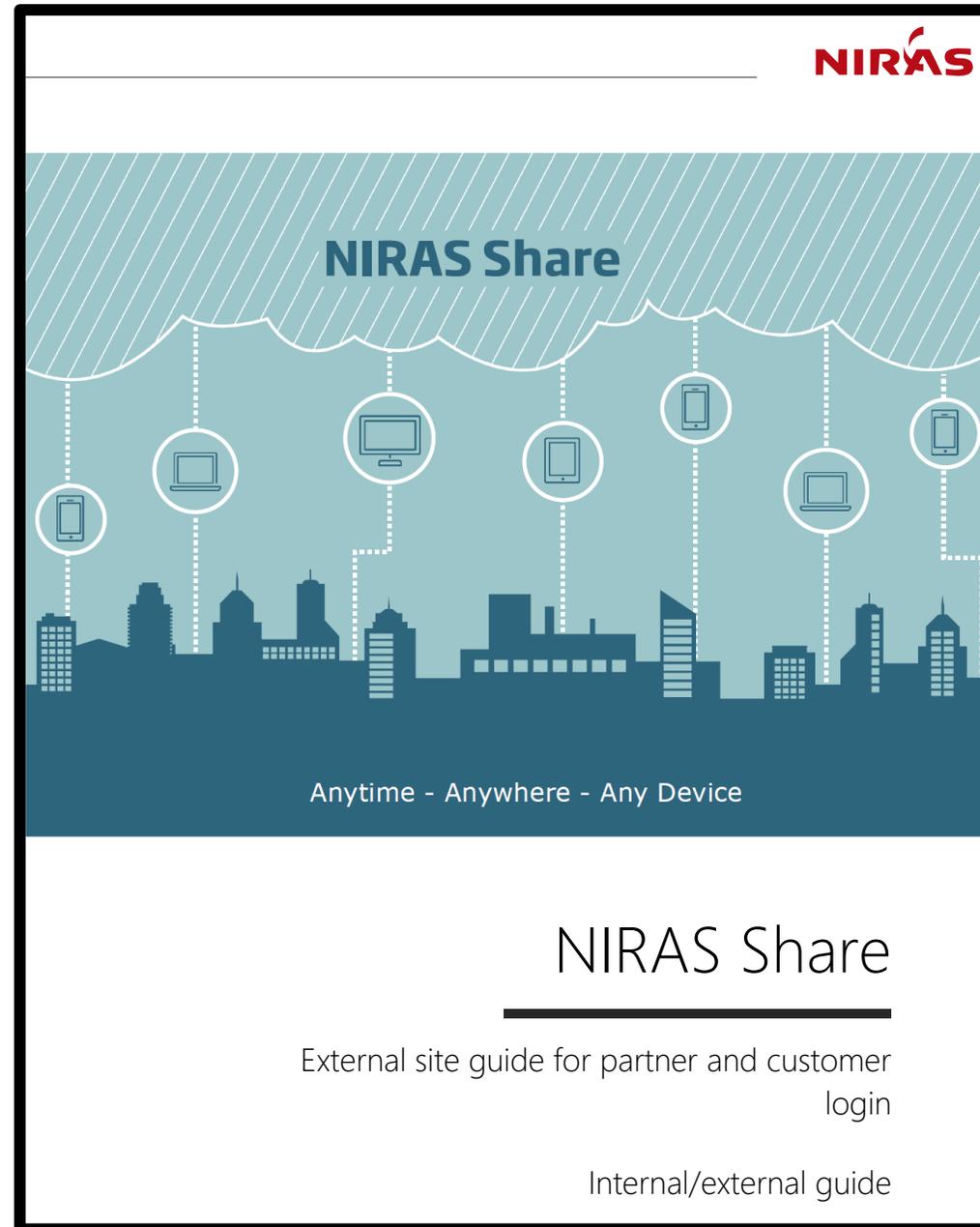
for external NIRAS Share users

# Registration and login

A guide on how to register and login to a NIRAS Share external site:

- General onboarding introduction
- Login with an existing Office 365 account
- Login with another e-mail account, e.g., Gmail
- Login via a file or folder sharing link
- Permissions as a collaborator or customer

**Right-click on the embedded document on this slide, select "Document Object", click "Open" =>**



The graphic is a vertical rectangular layout. At the top right is the NIRAS logo. Below it is a teal banner with a white scalloped border containing the text "NIRAS Share". Underneath the banner is a city skyline silhouette with several circular icons (laptop, desktop monitor, smartphone) connected to the banner by dotted lines. Below the skyline is the text "Anytime - Anywhere - Any Device". The bottom section is white and contains the text "NIRAS Share" underlined, followed by "External site guide for partner and customer login" and "Internal/external guide".

NIRAS

NIRAS Share

Anytime - Anywhere - Any Device

NIRAS Share

External site guide for partner and customer login

Internal/external guide

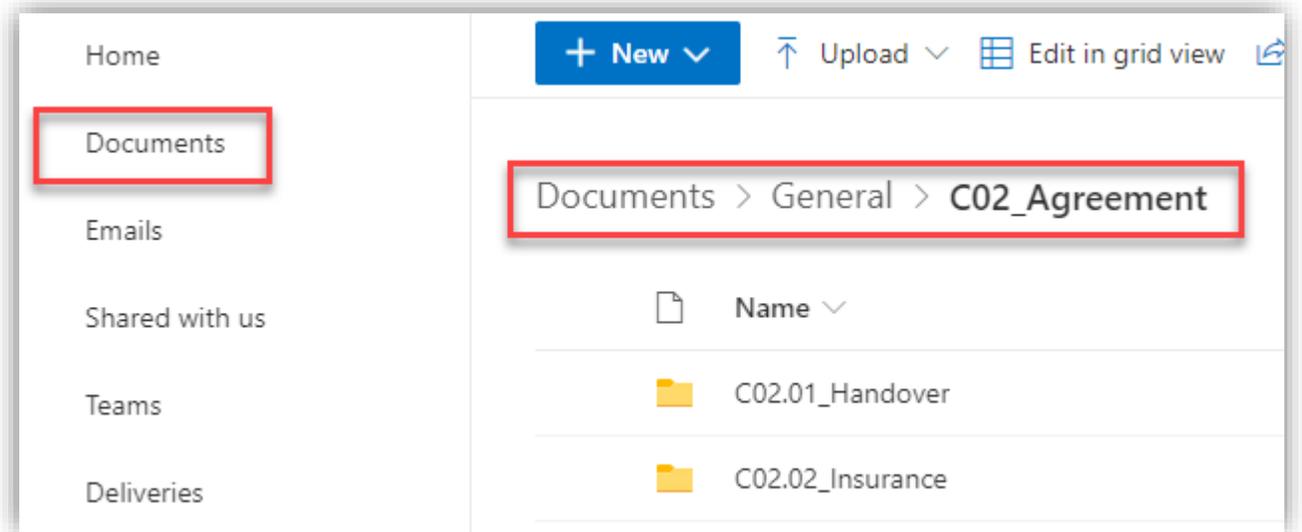
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# Navigate between folders

# Navigate between folders

Open "Documents" in the left menu

1. Click on the folder names to go through the folder structure
2. Go back in the folder structure via the path at the top



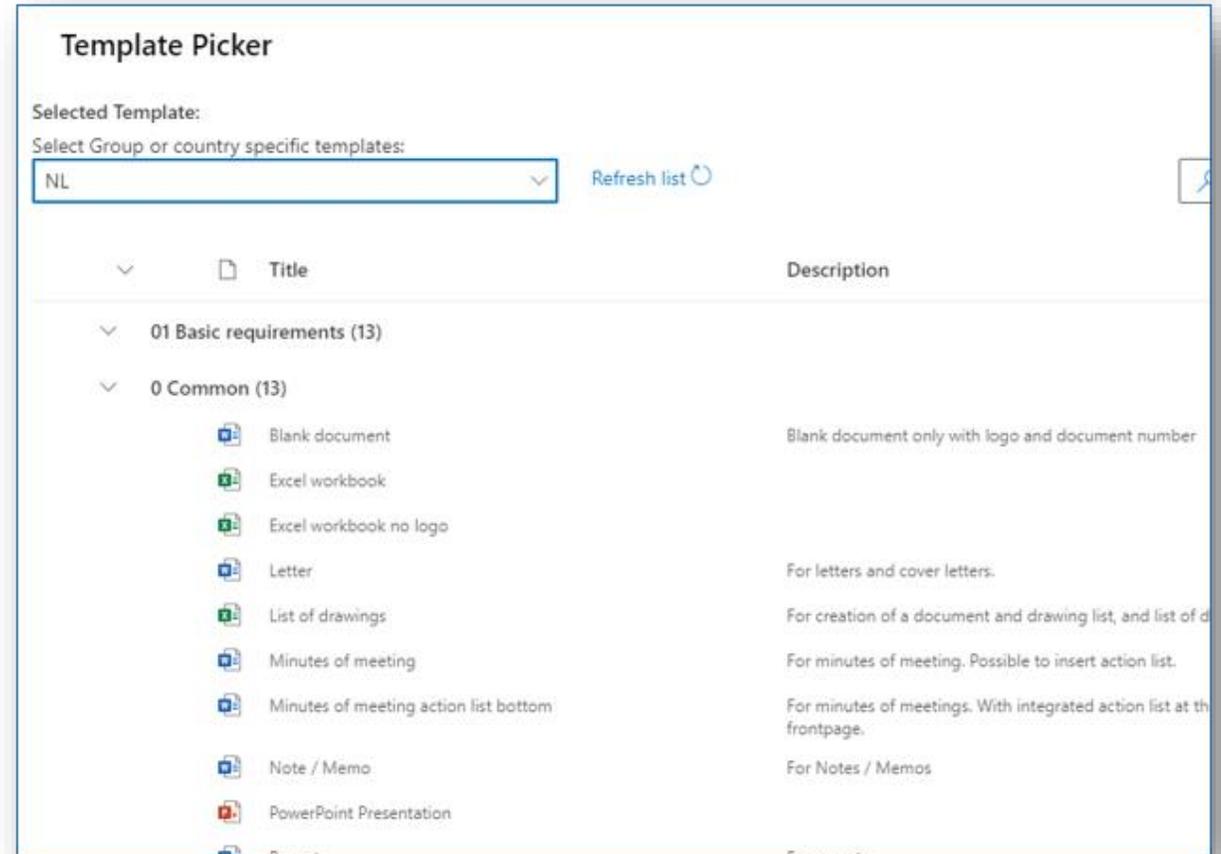
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# Create document

# Create document

Use the template picker for creating a new document based on a template or a project management tool.

1. Select the folder where the document is to be placed
2. Select "NIRAS" Template picker 
3. Filter the list by title/description or country
4. Select the document and click "OK"
5. Select the content information and click "OK"
6. Change the document name or select "Overwrite" if the document already exists. A new version of the document will be created.



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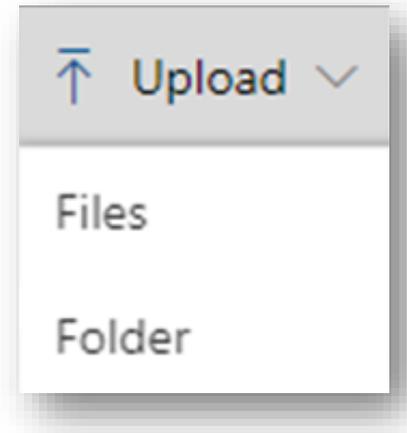
# Upload document

# Upload document

1. Select the wanted document(s) from the File Explorer and hold down the mouse button to drag and drop the documents in a folder in the document library.

OR

2. Select "Upload", select "Files" or "Folder" and then select the wanted document(s) or folder(s) and click "Open/OK".
3. Select more documents by using the CTRL or SHIFT key.



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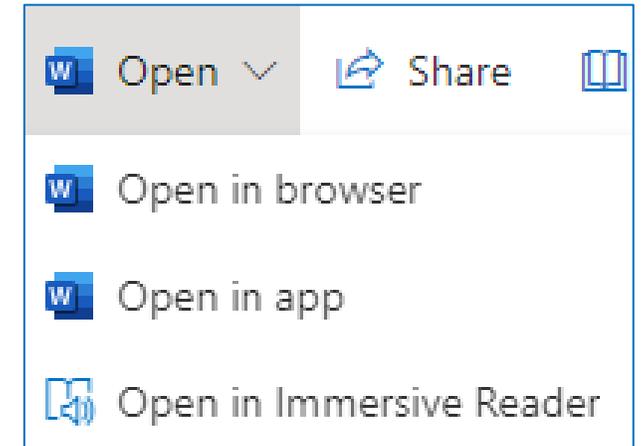
# Open document

# Open document

1. Open the project
2. Select "Documents" in the navigation panel
3. Click on the document name OR
4. Mark the document and select "Open" in the Ribbon Bar.  
You can choose between the installed or the online version of the programme.

It is recommended to use the online version when you are on the go and just need to correct a simple text or when you work from a device which is not your normal workplace computer.

**NOTE:** In the online version you will not find a save function as the document is saved automatically .



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# Autosave document

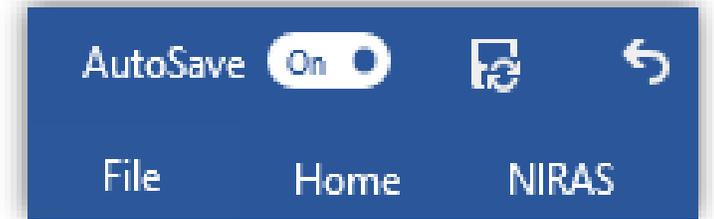
# Autosave document

In Office365 ProPlus the AutoSave feature is turned on by default. This has many advantages, e.g. when more persons work in the same document at the same time.

However, the disadvantage is that you might unconsciously make a minor version of the document.

The AutoSave feature can be turned off in one the following two ways:

1. Click on the command "On" in the top left corner to temporarily turn off the feature. This will follow the document, i.e. if others open the document, AutoSave will be turned off for them as well.
2. Select "File" -> "Options" -> "Save"  
Untick the "AutoSave OneDrive and SharePoint Online files ..." in order to generally turn off the feature. This can be done in Word, Excel or PowerPoint.  
This will follow the user, i.e. all documents will be opened without AutoSave being turned on, but the AutoSave status will be maintained for others.



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# Co-authoring a document

# Co-authoring a document

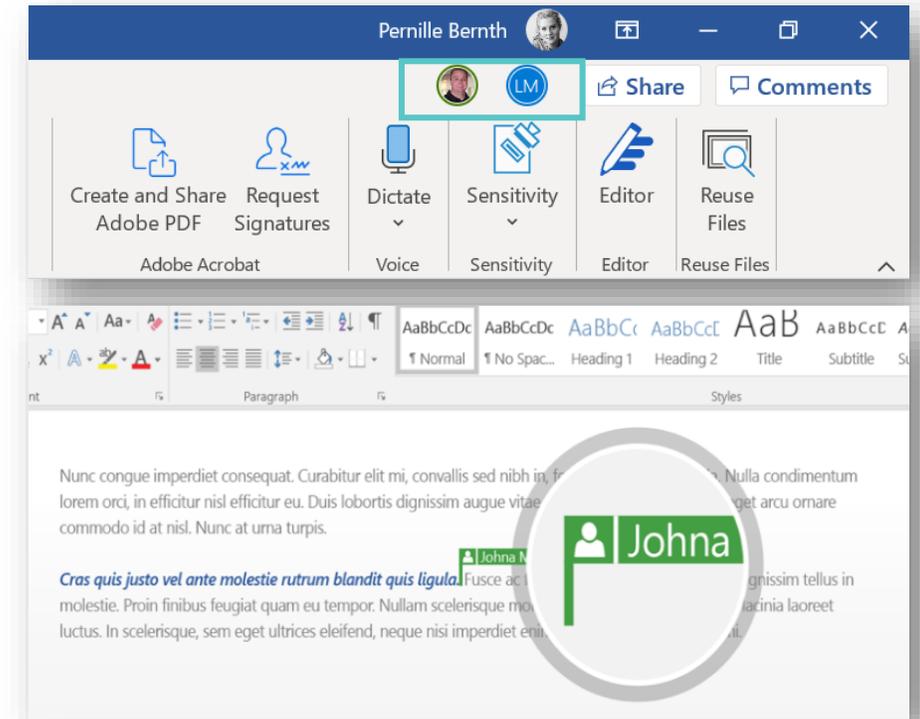
Working in a document at the same time as others

More persons can work in the same document at the same time if it is a Word, Excel or PowerPoint document.

Example:

1. Click on the document
2. Alternatively, select "Open" (Open in Word Online or Open in Word)
3. The number of persons currently editing the document is shown in the top right corner of the document

**NOTE:** Co-authoring also works if the project is synchronized.



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# Sharing a document

# Sharing a document

You can create a direct link to a particular document or folder and share with other site members (e.g. via email)

1. Select the document (or folder)
2. Click on the “Share” symbol: located in the top ribbon, to the right of the file, and as a right-click option.
3. A dialogue box opens with the document name, and the link option “People with existing access can use the link”. Depending on your access rights, additional options may exist.
4. Copy the link provided, and paste into e.g. the email.



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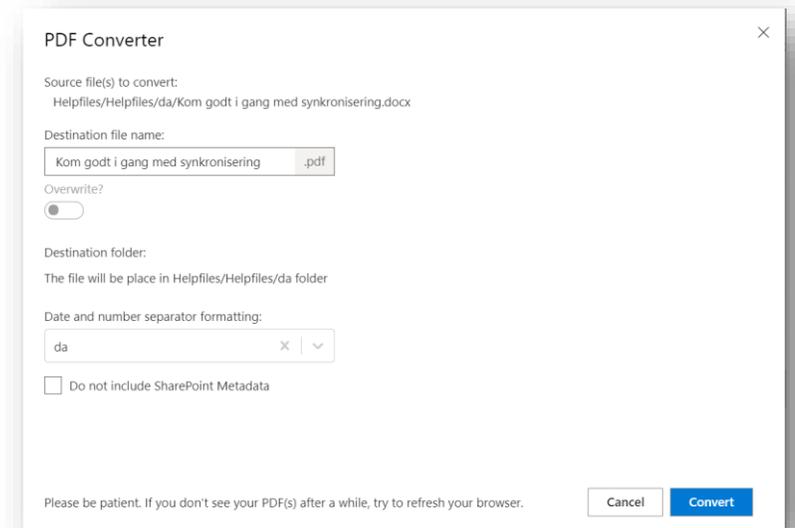
# Convert documents to PDF

# Convert a document to PDF

1. Select the document
2. Click "PDF" in the Ribbon Bar
3. Optionally, the PDF document can be renamed
4. Click "Convert"

If a document with the same name already exists in the folder you will get a warning. Change the name of the document or turn on "Overwrite" (makes a new version of the existing document).

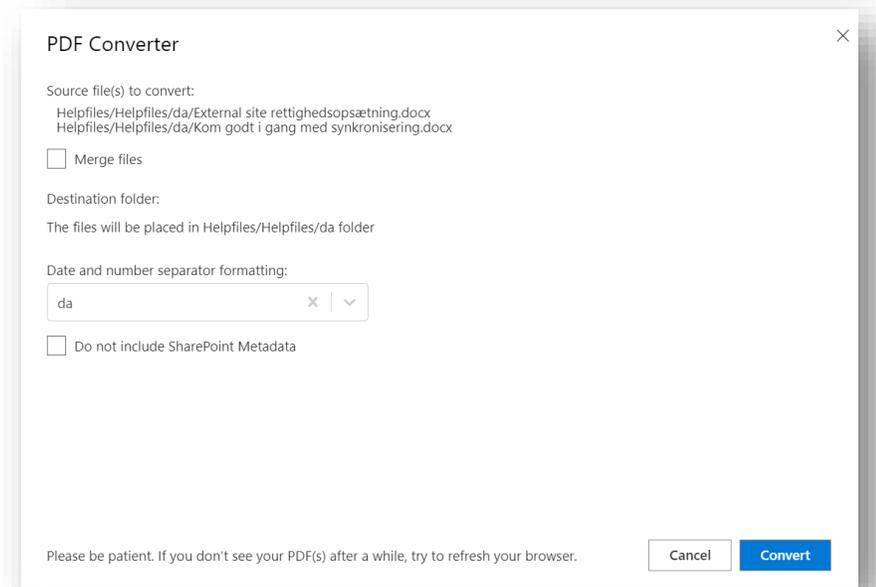
**Tip:** Select "Do not include SharePoint Metadata" if you do not want your PDF document to contain the metadata from the original document.



# Convert more documents to PDF

1. Select the documents for PDF
2. Click "PDF"
3. Click "Convert"

All documents are converted to separate PDF documents.  
If a document with the same name already exists in the folder, a new version of the existing document will be made.

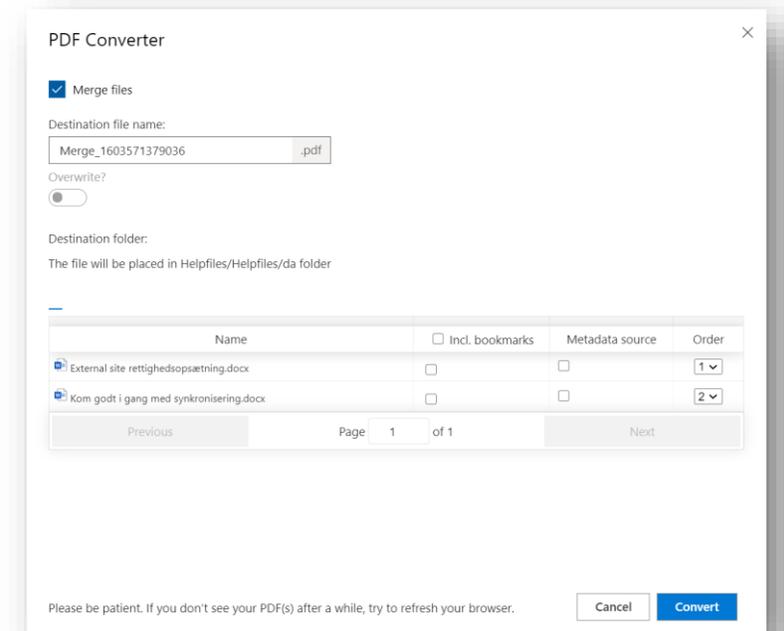


The screenshot shows a 'PDF Converter' dialog box with the following content:

- PDF Converter** (Title bar)
- Source file(s) to convert:
  - Helpfiles/Helpfiles/da/External site rettighedsopsætning.docx
  - Helpfiles/Helpfiles/da/Kom godt i gang med synkronisering.docx
- Merge files
- Destination folder:  
The files will be placed in Helpfiles/Helpfiles/da folder
- Date and number separator formatting:  
da (dropdown menu)
- Do not include SharePoint Metadata
- Please be patient. If you don't see your PDF(s) after a while, try to refresh your browser.
- Buttons: Cancel, Convert

# Convert more documents to one PDF

1. Select the documents for PDF
2. Click "PDF"
3. Click "Merge files"
4. Optionally, the name of the PDF document can be changed
5. Optionally, another sequence of the documents can be selected by using the order column
6. Click "Convert"



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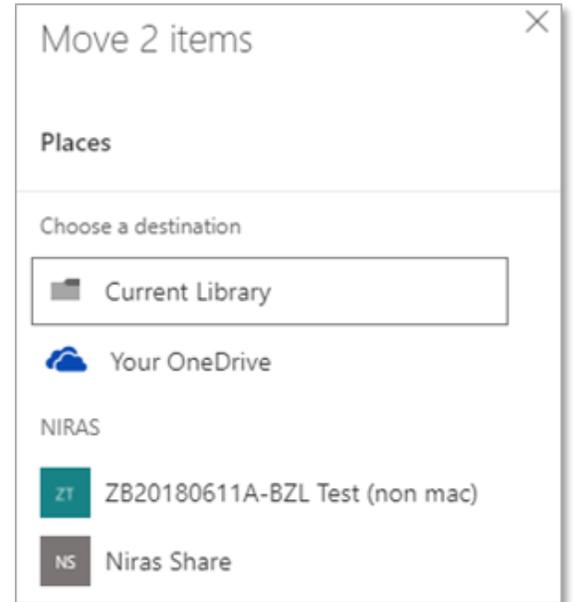
# Move and copy document/folder

# Move document

1. Select the document(s) that you want to move
2. Select "Move to"
3. Select a destination:
  - Current Library, OneDrive, or another project file
4. Select the destination folder
5. Create a new folder if necessary
6. Select "Move here"

When you move one or more documents, you move the document(s) with the version history.

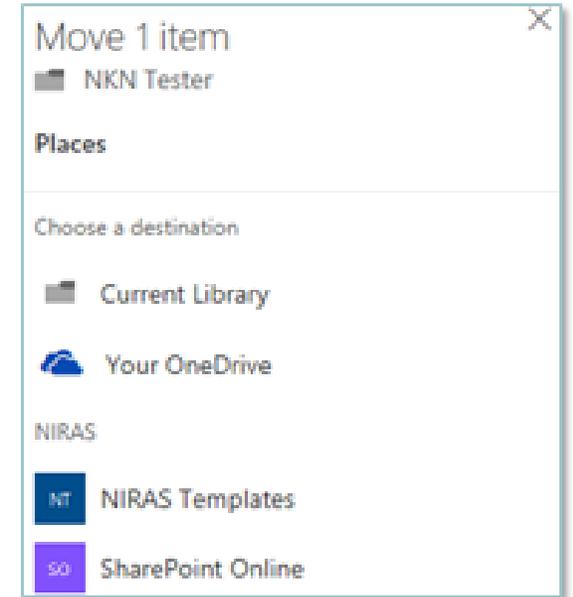
**TIP:** You can only find the NIRAS Share projects that you follow or have entered recently.



# Move folder

1. Select the folder(s) that you want to move
2. Select "Move to"
3. Select destination:
  - Current Library, OneDrive, or another project file
4. Select the destination folder
5. Create a new folder if necessary
6. Select "Move here"

**TIP:** You can only find the NIRAS Share projects that you follow or have entered recently.

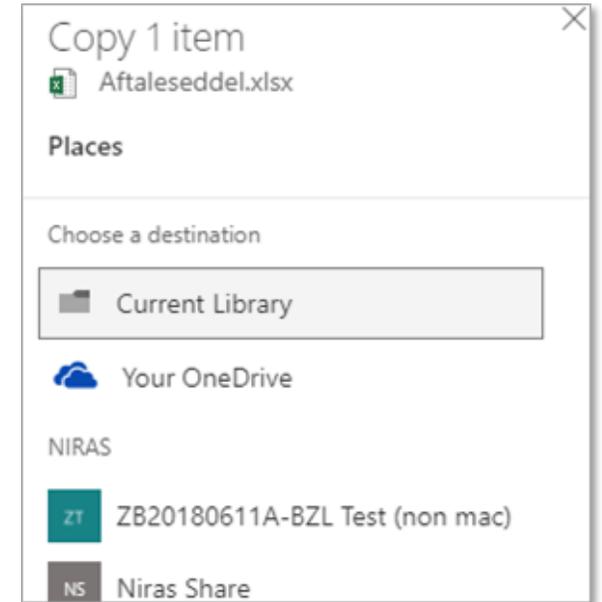


# Copy document

1. Select the document(s) that you want to copy
2. Select "Copy to"
3. Select destination:
  - Current Library, OneDrive, or another project file
4. Select the destination folder
5. Create a new folder if necessary
6. Select "Copy here"

When you make a copy of a document, you basically generate a new document based on the old document, and the version history will not be included.

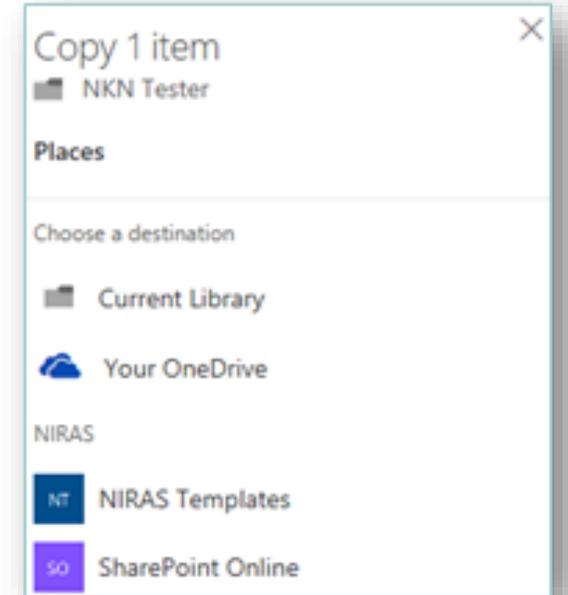
**TIP:** You can only find the NIRAS Share projects that you follow or have entered recently.



# Copy folder

1. Select the folder(s) that you want to copy
2. Select "Copy to"
3. Select destination:
  - Current Library, OneDrive, or another project file
4. Select the destination folder
5. Create a new folder if necessary
6. Select "Copy here"

**TIP:** You can only find the NIRAS Share projects that you follow or have entered recently.



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# Rename document/folder

# Rename document

1. Select the document
2. Select "Rename" in the Ribbon Bar
3. Write a new document name
4. Select "Save"

 **Rename**

# Rename folder

1. Select the folder
2. Select "Rename" in the Ribbon Bar
3. Write a new folder name
4. Select "Save"

 **Rename**

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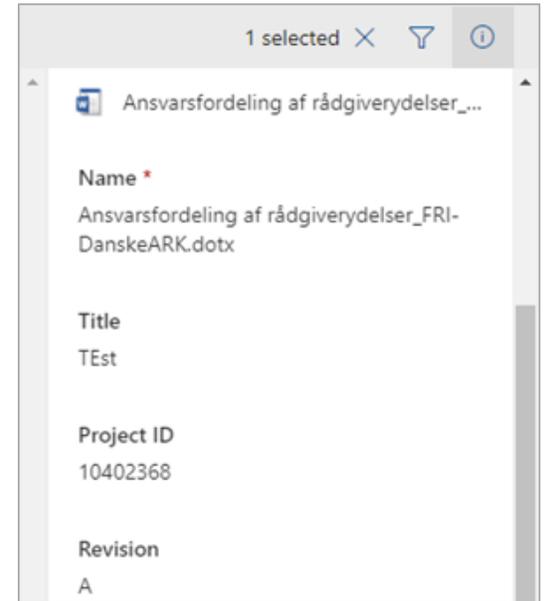
# Attach metadata to a document

# Attach metadata to a document

Metadata is an information or a "tag" which can be attached to the document and thus categorize the document. As an example, metadata can be used for filtering and searching.

1. Select the document
2. Right-click and select "Details" or click on  in the right corner
3. Fill in the metadata and press "Enter"

**NOTE:** If several documents are selected you must choose "Save" after the change has been carried out.



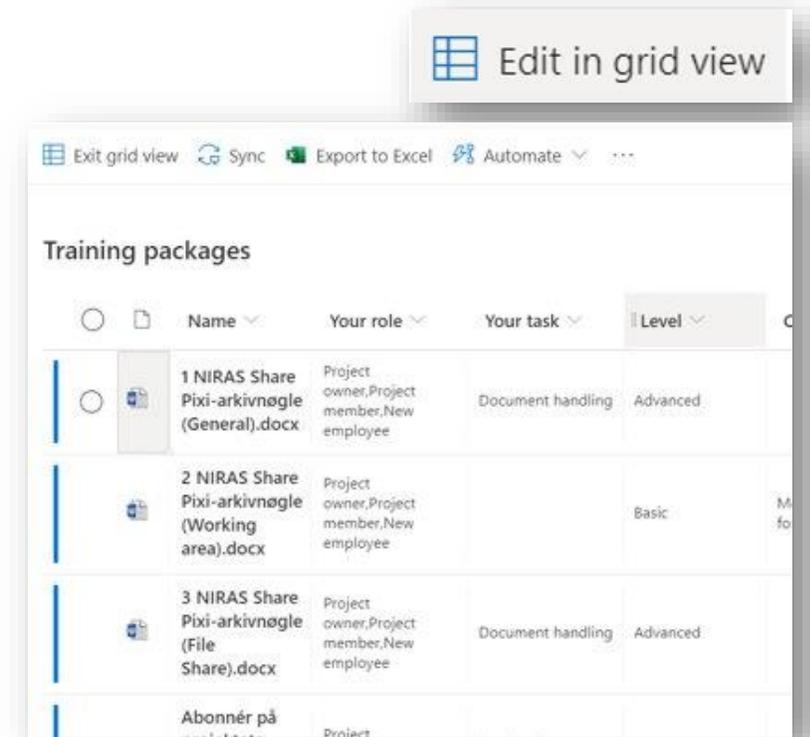
Save

# Attach metadata to more documents

## “Edit in grid view”

1. To update the metadata of many documents you can advantageously use “Edit in grid view”; no documents must be selected
2. Select “Edit in grid view”
3. Update the metadata field of the document concerned
4. Use the traditional Copy and Paste (CTRL + C & V) or drag the small dot in the bottom right corner of the cell to copy to the files below
5. Click “Exit grid view”

**NOTE:** There is no undo so you must pay extra attention to what you are doing here.



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# Delete document

# Delete document

1. Select the document or documents
2. Select "Delete" in the Ribbon Bar
3. Deleted documents can be found in the Recycle bin

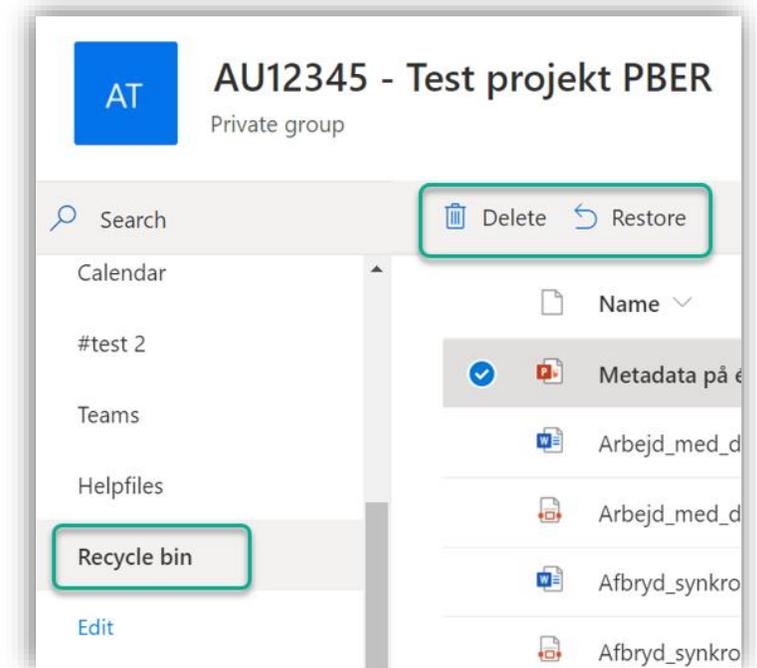


# Restore deleted documents

1. Up to 30 days after having deleted a document it can be found in the Recycle bin. Everybody can make a Restore from here.
2. Between 30-90 days after having deleted a document the document can be found in the Second-stage recycle bin. A link to this is found in the bottom of the Recycle bin. Only the project owners have access to this and thus only the project owners can make a Restore from here.
3. More than 90 days after having deleted a document the document can – depending on the backup rule – be restored by IT.

There are two backup rules:

- Standard: 10 years
- GDPR: 90 days



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# Create version of document

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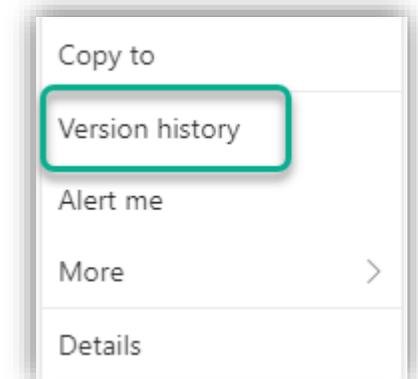
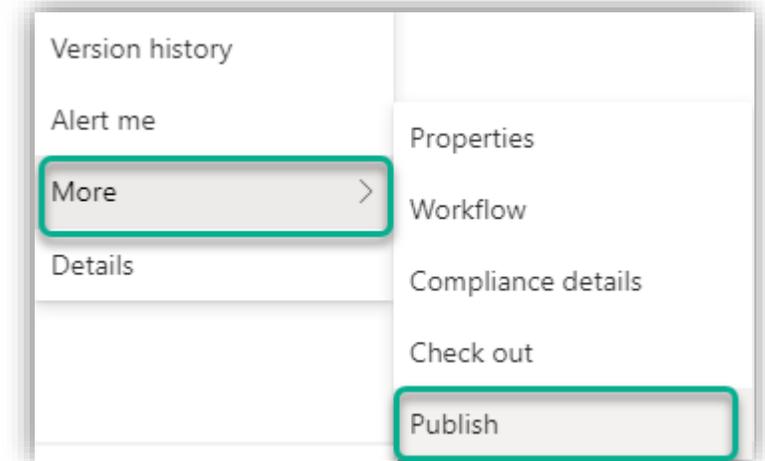
# Create version of document

The minor version is considered as a draft version and the major version as an official version.

- A minor (x.01, x.02 ...) version is automatically made when a document is edited or the metadata is changed
- A major (1.0, 2.0 ...) version is made manually by right-clicking on the document and selecting "Publish" under "More". Here a comment can be added to the version

Previous versions of a document can be seen by right-clicking on the document and selecting "Version history".

It is recommended that you create a Major version of the document before issuing it. That way, it's easy to get back to it later.



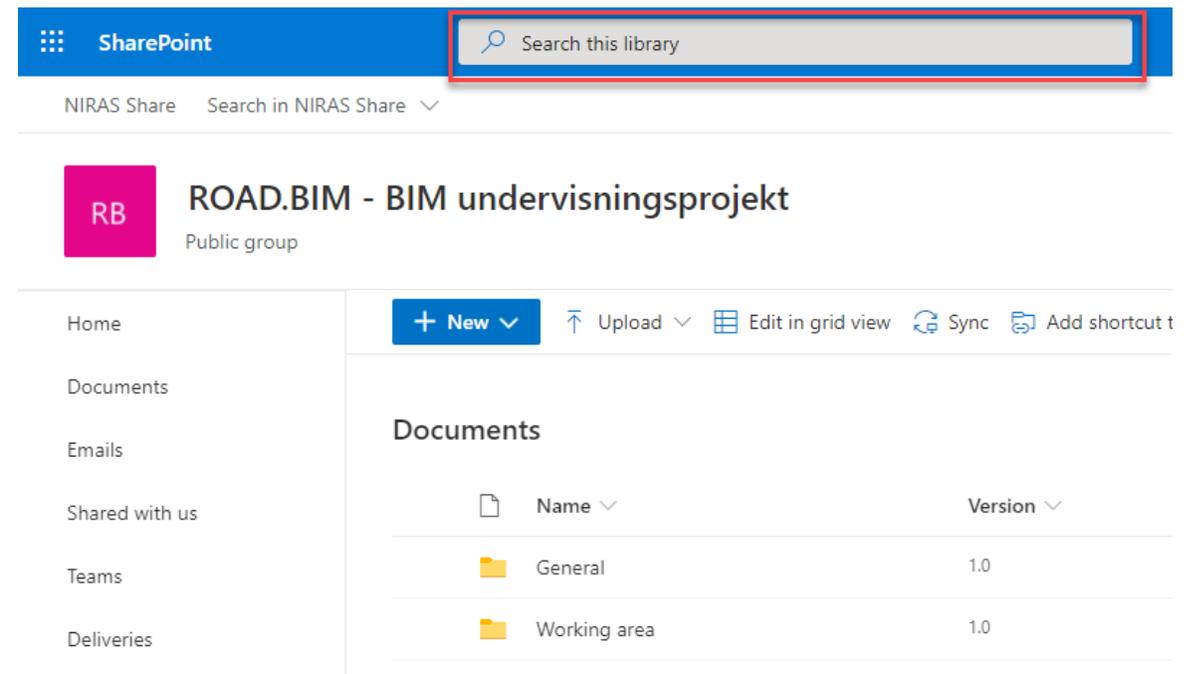
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# Search for documents in projects

# Search for documents in projects

You can search for documents in your project directly from the project.

1. Open the project
2. Use the search box "Search this library" in the search box at the top



The screenshot shows a SharePoint interface for a project named "ROAD.BIM - BIM undervisningsprojekt". At the top, there is a blue header bar with the "SharePoint" logo and a search box labeled "Search this library" which is highlighted with a red border. Below the header, the project name and "Public group" are displayed. A navigation pane on the left lists "Home", "Documents", "Emails", "Shared with us", "Teams", and "Deliveries". The main content area shows a "Documents" section with a table listing folders: "General" and "Working area", both with a version of 1.0. The table has columns for "Name" and "Version".

Name	Version
General	1.0
Working area	1.0

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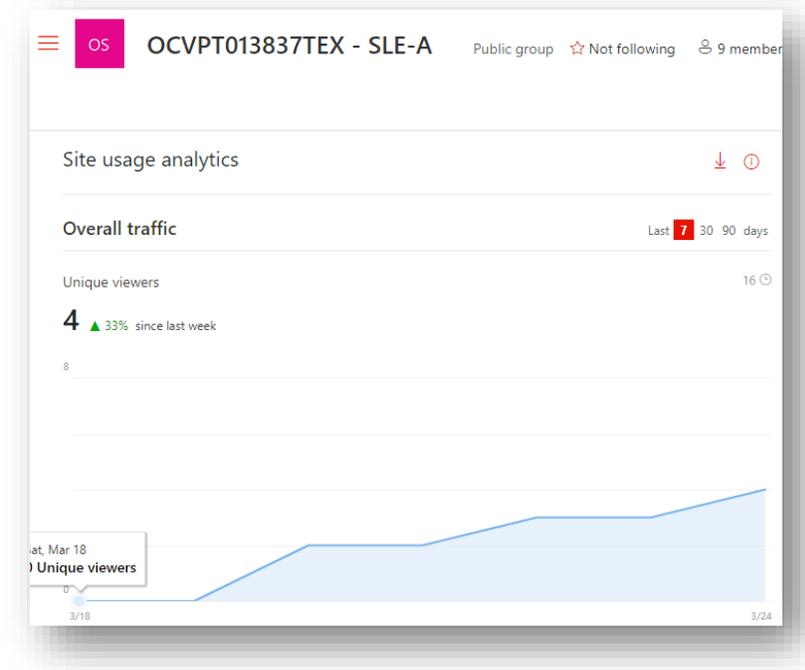
# Site Usage

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# Site usage analytics

You can view SharePoint site usage statistics, including site traffic, unique users, popular documents and news, and how often/when there is activity on the site.

1. In the top-right corner of the screen, click on the gear symbol
2. Select "Site usage"



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# Alert Me

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# "Alert me" on files, folders and libraries

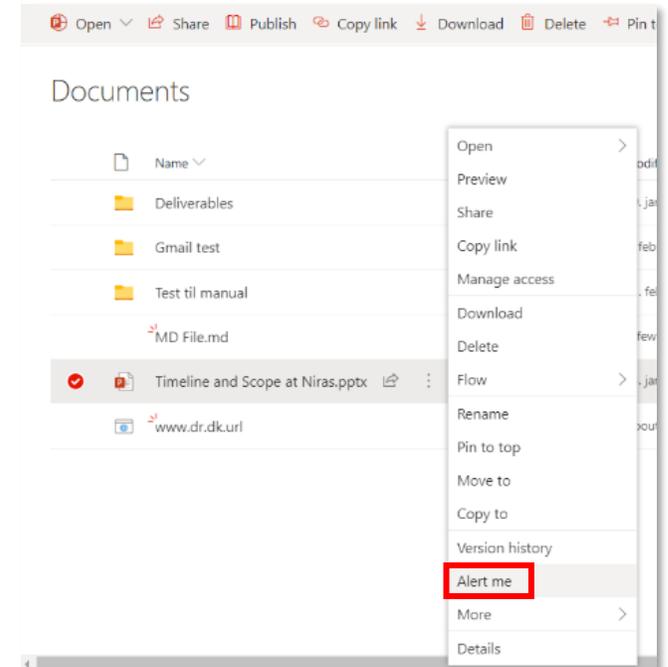
To track changes to your document you can create an "Alert me". You will then get an alert when the document is changed.

"Alert me" can be useful if you are awaiting for review or edits from team members on a key document.

You can also create an "Alert me" on a folder or a library. In that case, you will get an alert when a new document is added or when a document is changed or deleted.

You can setup various criteria for you alerts.

1. Select a file
2. Click on the three dots
3. Choose "Alert me"
4. Fill-in the "Alert me" form
5. You will receive a confirmation email, which includes a link to manage or delete your Alerts at any time.



Thank you

In case of questions,  
please contact the Project  
Manager.

# NIRAS Share



Anytime - Anywhere - Any Device