Using Your Group Share

Pre-transfer Guidelines

The initial process of transferring your groups network files into your new group site generally requires the movement of dozens, hundreds or even thousands of files. Before you start transferring files over, please review the pre-transfer guidelines:

1. Review, delete, and organize the files within your network share. Look out for duplicates and multiple versions, temp files, and non-standard files such as videos and proprietery file formats.

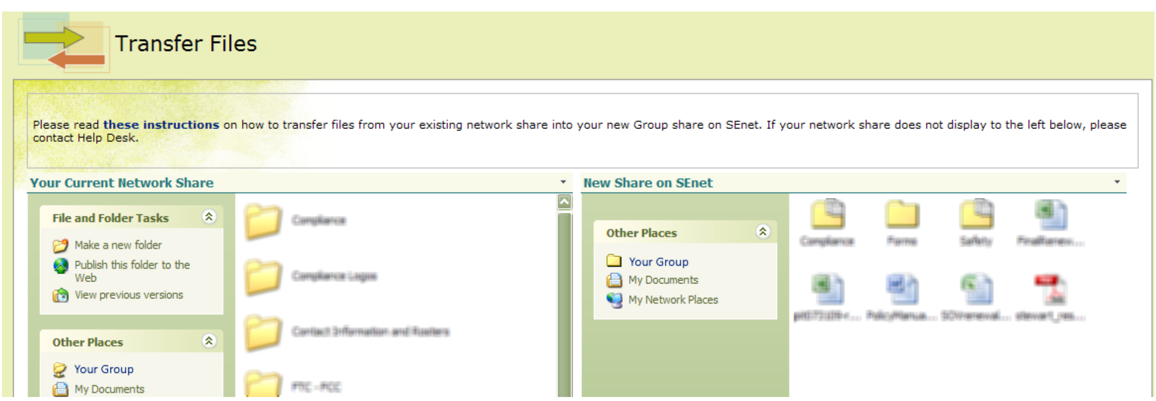
2. Make sure that your filenames follow SEnet standards. In general, make filenames short, concise, and descriptive, free of spaces and special characters. For example, take the filename: 2010 User Guide.pdf. A better way to name this file is: 2010_User_Guide.pdf

3. Decide what title and description you would like to add for each file. For example:
Title: 2010 SEnet Users Guide
Description: 2010 version of the SEnet Users Guide. Explains how to use SEnet and includes an FAQ and troubleshooting tips.

Transferring Files

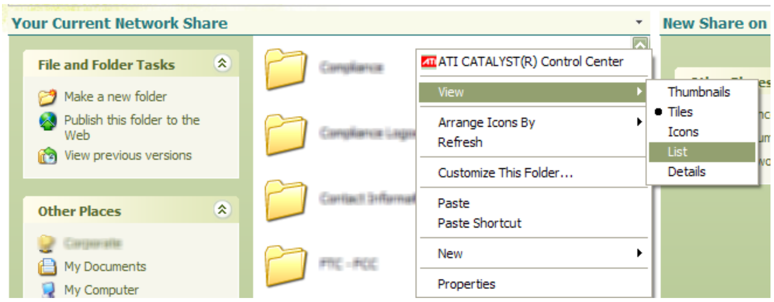
When you are ready to start transferring files, go to your group site and click on the tab **Transfer Files:**

The *Transfer Files* page will display. To the left of the screen will be your existing network share. Your new group share on SEnet will display to the right:



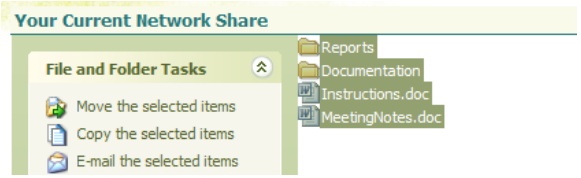
Changing the Display of Files

If you want to change how the documents and folders are displayed, right-click in the file area, click **View** and select from the list that displays:

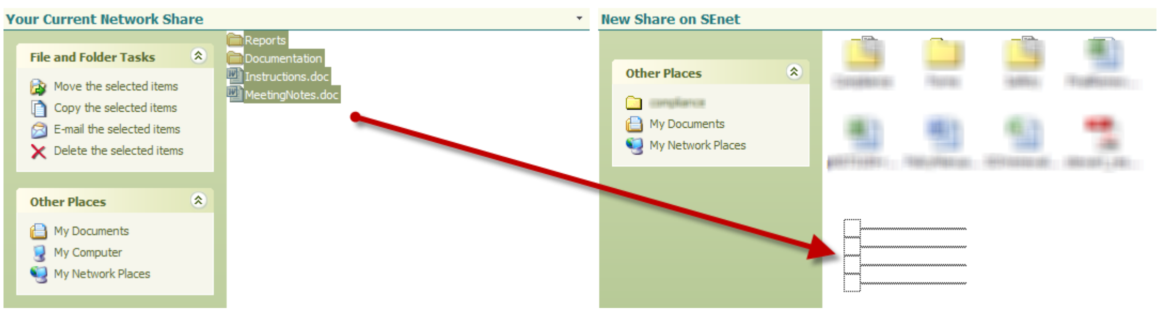


Transferring Files and Folders

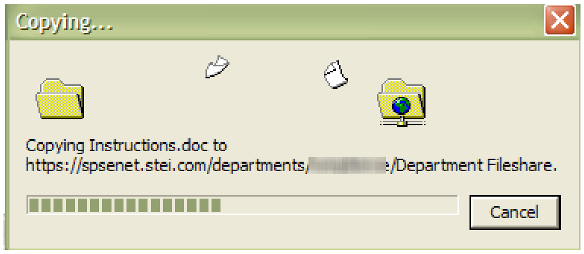
Select the files and folders you wish to transfer:



Now drag them over into the right-hand column:



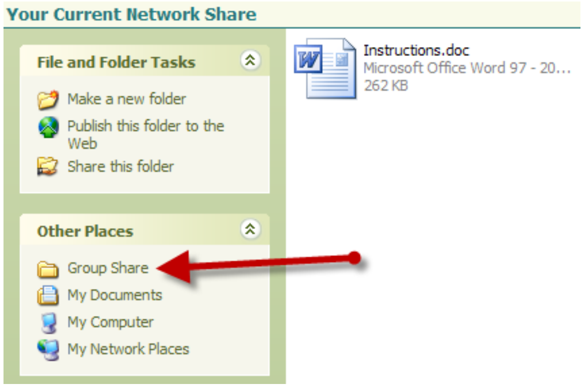
A dialog box will display indicating that the files are being copied to the new library:



The files will then display in the new SEnet group share. Make sure that you delete the files from the existing network share. It is also recommended that you limit the amount of files transferred at any one time to around 100 mb.

Moving Between Folders

If you click on a folder and then wish to go back up to the parent folder, on the left side of the *Your Current Network Share* display there is a navigation pane called *Other Places*. The parent folder of the folder you are in currently should display here. Click the parent folder name to be returned to that folder:

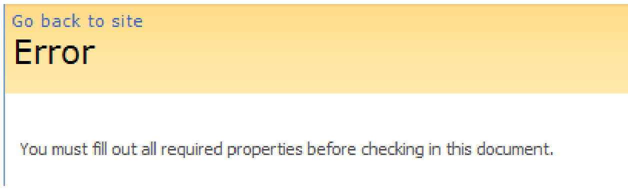


Adding Metadata and Checking In Files

Files that are transferred over are not available immediately to other users until they are checked in. Files that are checked out are indicated by a down arrow icon:

Rollover the name of a file and select **Edit Properties** from the list that displays:

Note: If you select **Check In** at this point instead, you will receive this error:



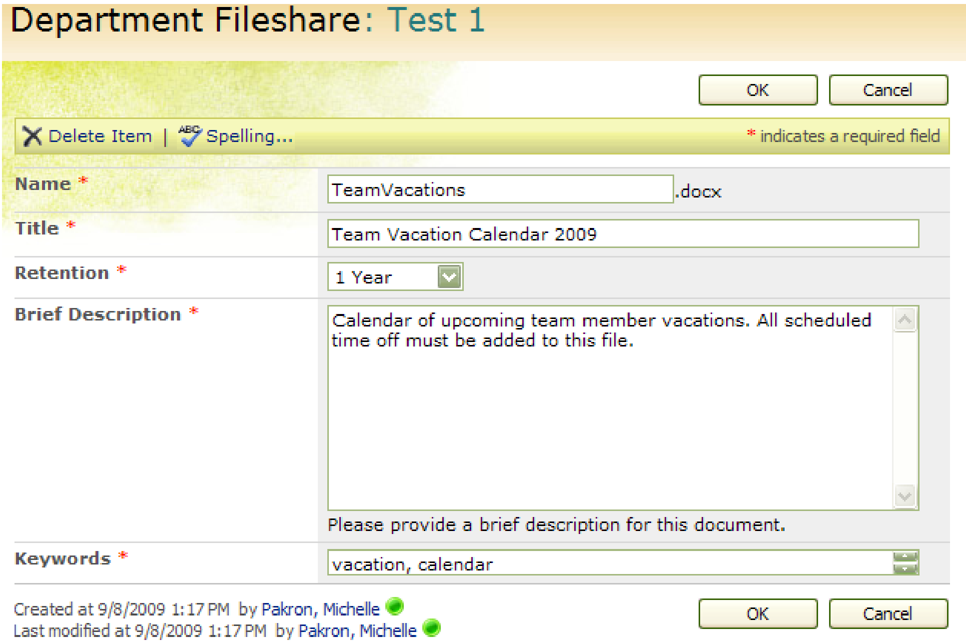
All required metadata (descriptive information fields) must be entered before any file can be checked in.

Adding Metadata

Clicking **Edit Properties** will open the edit item screen for the chosen file. There are five metadata fields that display; all are required.

Name: Make sure that the name of the file is short, descriptive, and has no spaces or special characters.
Title: Enter a descriptive title for the file.
Retention: Choose a retention period for the file. You may choose 1 year, 3 years, 5 years or Permanent. After this date passes, the file will be automatically deleted.
Brief Description: Briefly summarize the contents of the file.
Keywords: Add descriptive keywords that will aid the search retrieval of the file.

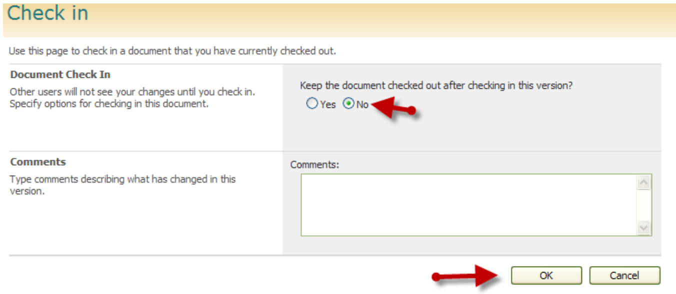
Click **OK**. The file will still be checked out.

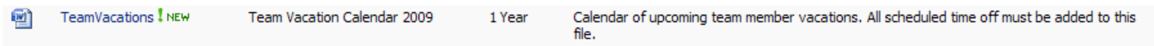


Checking In the File

Rollover the filename and select **Check In:**

The **Check In** page will display. Keep the default settings and click **Ok**. The file will now be checked in and visible to all other authorized users.



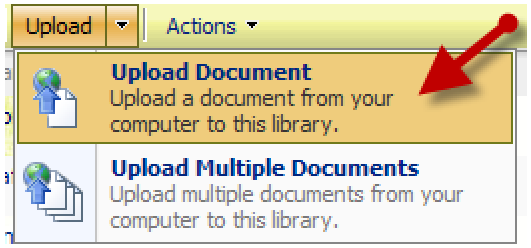


Other Ways of Adding Files

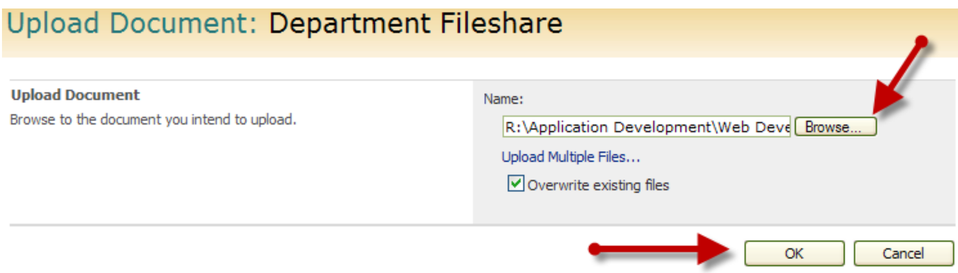
Once the initial mass transfer of files has been completed, other methods of adding files to the share can be used.

Adding Files from the SEnet Share

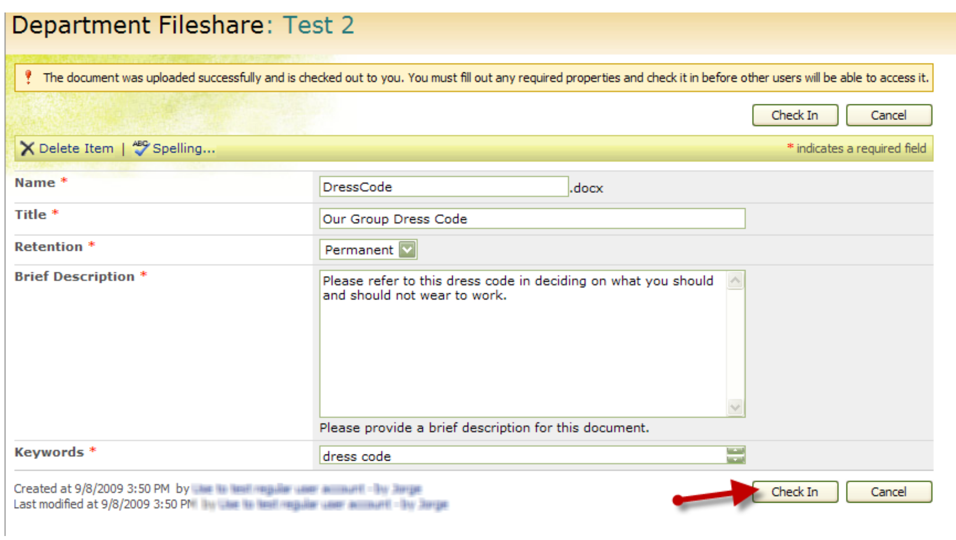
Go to your group share on SEnet and click **Upload** from the toolbar that displays. To add a single file, choose **Upload Document**:



The *Upload Document* screen will display. Click **Browse** and find the file you wish to upload and click **OPEN**, then click **OK**.



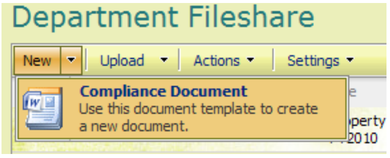
The *Edit Item* screen will display. Add the required metadata and then click **Check In**.



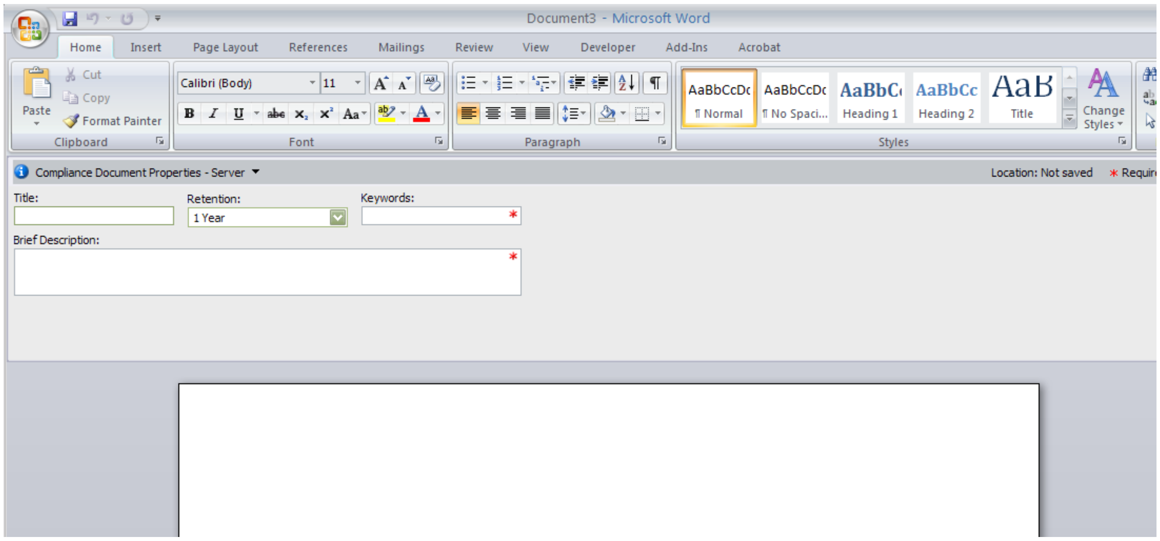
The file will then be checked in and viewable to other users.

Creating Word Files from Within the Department Filshare

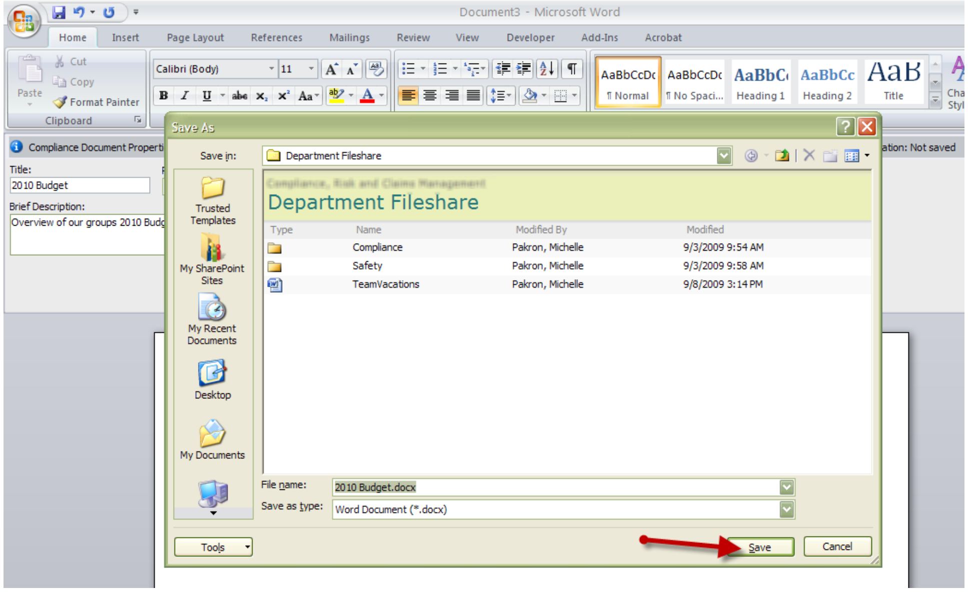
If you are in your department fileshare on SEnet you can create a new Word document by going to **New > Compliance Document:**



Word will open and a document information panel will display above the document entry area. The file will not be saved until all of the required information in the panel is entered.

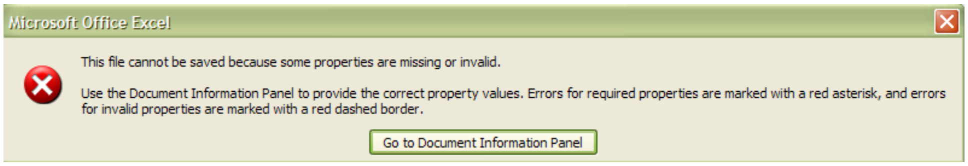


Create your document and then go to **Save As > Word Document**. Your file location should be set to your department fileshare. Name your file and click **Save**. Go back to the Department Fileshare and refresh the page. Your document should now display.

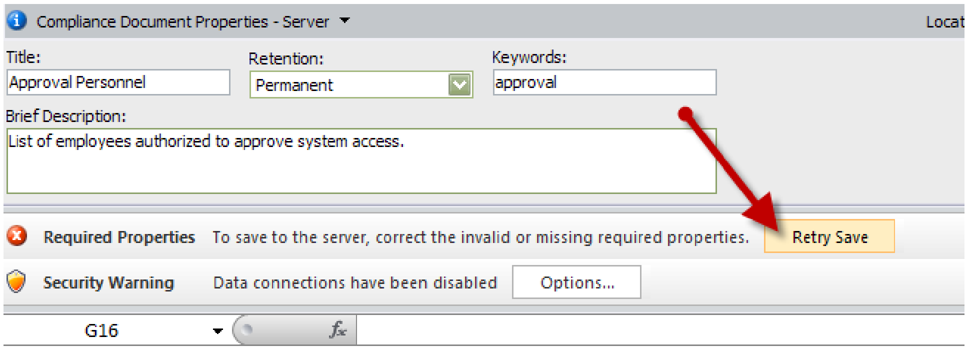


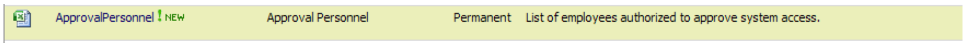
Creating New Excel Files

To create a new Excel file, open Excel and create a new document. Go to **Save As > Excel Workbook**. The *Save As* dialog will display. In the *Save in* area, click **My SharePoint Sites**. Your department site should be listed here. Navigate to your group share and choose where you wish to save the file (you can save the file within a folder that is in the share or at the root of the share.) Upon save, a dialog box will display alerting you that the file cannot be saved until required properties are entered. Click the **Go to Document Information Panel** button to add the metadata:



The *Document Properties* panel will display. Add all of the required properties and then click the **Retry Save** button. Your file should now be saved in your group share. You may have to refresh the share page to see the updated file:





Adding Non-Office Documents

To create and add non-Office files, such as PDF's, .txt, .jpg, etc., the easiest way to add them to your share is to create them and then save them on your PC. Then add them to your share using **Upload > Upload Document**. Add the required properties in the screen that displays and then click **Check In**.

A list of supported file formats should have been provided to your group; please contact your group site *Site Admin* for more information.

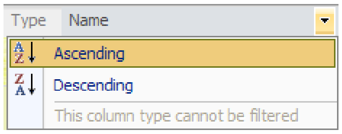
Using Your Group Share

Your group share is a SharePoint library that consists of several metadata (descriptive information) columns. These columns can be sorted much like columns in Excel. The columns displayed are:

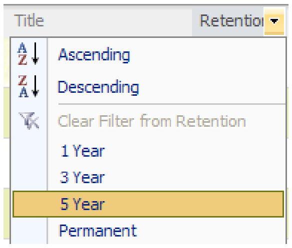
Type: Icon indicates the type of document the file is.
Name: The filename of the document.
Title: The title of the document.
Retention: Indicates the retention period for the document. After the chosen date, the file will be deleted.
Brief Description: Summary of the document.
Created: The date the file was created. This is the date that the retention policy uses.
Modified By: Displays the name of the last person to modify the document.
Modified: indicates the date of the last modification of the file.
File Size: The actual file size of the document.

Sorting Columns

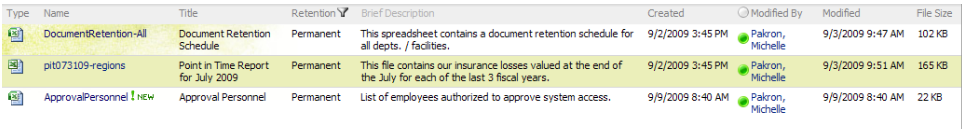
Most columns can be sorted. To sort by the *Name* column, rollover the *Name* column header and select *Ascending* or *Descending* from the list that displays:



To sort by other columns, rollover the name of the column and select from the list that displays:

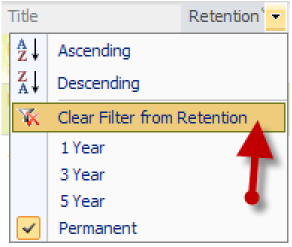


In this example, the *Retention* column has been sorted by *Permanent*. The screen refreshed and now only displays files that have retention periods that equal *Permanent*:



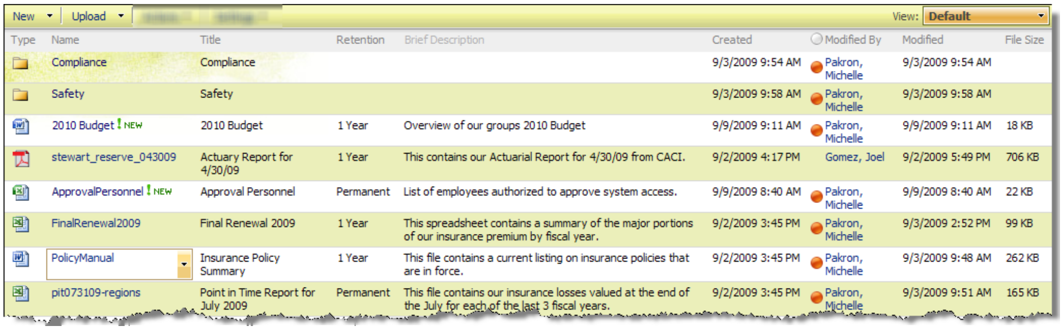
Type	Name	Title	Retention	Brief Description	Created	Modified By	Modified	File Size
	DocumentRetention-All	Document Retention Schedule	Permanent	This spreadsheet contains a document retention schedule for all depts. / facilities.	9/2/2009 3:45 PM	Pakron, Michelle	9/3/2009 9:47 AM	102 KB
	pit073109-regions	Point in Time Report for July 2009	Permanent	This file contains our insurance losses valued at the end of the July for each of the last 3 fiscal years.	9/2/2009 3:45 PM	Pakron, Michelle	9/3/2009 9:51 AM	165 KB
	ApprovalPersonnel ! NEW	Approval Personnel	Permanent	List of employees authorized to approve system access.	9/9/2009 8:40 AM	Pakron, Michelle	9/9/2009 8:40 AM	22 KB

To remove a filter from a column, rollover the column name and select **Clear Filter from...** from the list that displays:



Views

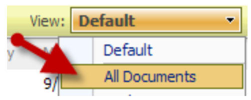
Views are different ways to display files in a library. The default view for the group share lists files that are at the root of the share as well as the top level folders:



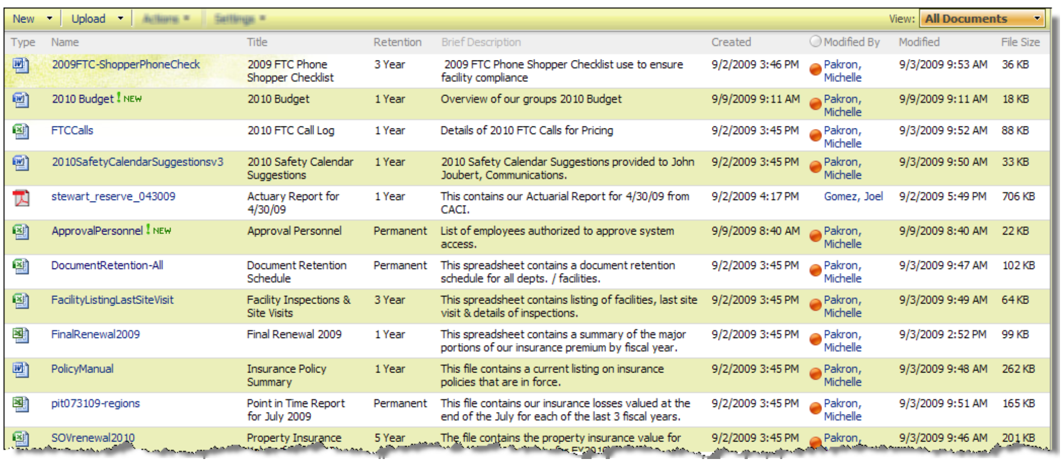
New | Upload | View: Default

Type	Name	Title	Retention	Brief Description	Created	Modified By	Modified	File Size
	Compliance	Compliance			9/3/2009 9:54 AM	Pakron, Michelle	9/3/2009 9:54 AM	
	Safety	Safety			9/3/2009 9:58 AM	Pakron, Michelle	9/3/2009 9:58 AM	
	2010 Budget ! NEW	2010 Budget	1 Year	Overview of our groups 2010 Budget	9/9/2009 9:11 AM	Pakron, Michelle	9/9/2009 9:11 AM	18 KB
	stewart_reserve_043009	Actuary Report for 4/30/09	1 Year	This contains our Actuarial Report for 4/30/09 from CACI.	9/2/2009 4:17 PM	Gomez, Joel	9/2/2009 5:49 PM	706 KB
	ApprovalPersonnel ! NEW	Approval Personnel	Permanent	List of employees authorized to approve system access.	9/9/2009 8:40 AM	Pakron, Michelle	9/9/2009 8:40 AM	22 KB
	FinalRenewal2009	Final Renewal 2009	1 Year	This spreadsheet contains a summary of the major portions of our insurance premium by fiscal year.	9/2/2009 3:45 PM	Pakron, Michelle	9/3/2009 2:52 PM	99 KB
	PolicyManual	Insurance Policy Summary	1 Year	This file contains a current listing on insurance policies that are in force.	9/2/2009 3:45 PM	Pakron, Michelle	9/3/2009 9:48 AM	262 KB
	pit073109-regions	Point in Time Report for July 2009	Permanent	This file contains our insurance losses valued at the end of the July for each of the last 3 fiscal years.	9/2/2009 3:45 PM	Pakron, Michelle	9/3/2009 9:51 AM	165 KB

To see all of the content in the share, including files that are within folders, go to **View > All Documents**:



The screen will refresh and the *All Documents* View will display. Views can be switched at anytime using the **View** menu.



New | Upload | View: All Documents

Type	Name	Title	Retention	Brief Description	Created	Modified By	Modified	File Size
	2009FTC-ShopperPhoneCheck	2009 FTC Phone Shopper Checklist	3 Year	2009 FTC Phone Shopper Checklist use to ensure facility compliance	9/2/2009 3:46 PM	Pakron, Michelle	9/3/2009 9:53 AM	36 KB
	2010 Budget ! NEW	2010 Budget	1 Year	Overview of our groups 2010 Budget	9/9/2009 9:11 AM	Pakron, Michelle	9/9/2009 9:11 AM	18 KB
	FTCCalls	2010 FTC Call Log	1 Year	Details of 2010 FTC Calls for Pricing	9/2/2009 3:45 PM	Pakron, Michelle	9/3/2009 9:52 AM	88 KB
	2010SafetyCalendarSuggestionsv3	2010 Safety Calendar Suggestions	1 Year	2010 Safety Calendar Suggestions provided to John Joubert, Communications.	9/2/2009 3:45 PM	Pakron, Michelle	9/3/2009 9:50 AM	33 KB
	stewart_reserve_043009	Actuary Report for 4/30/09	1 Year	This contains our Actuarial Report for 4/30/09 from CACI.	9/2/2009 4:17 PM	Gomez, Joel	9/2/2009 5:49 PM	706 KB
	ApprovalPersonnel ! NEW	Approval Personnel	Permanent	List of employees authorized to approve system access.	9/9/2009 8:40 AM	Pakron, Michelle	9/9/2009 8:40 AM	22 KB
	DocumentRetention-All	Document Retention Schedule	Permanent	This spreadsheet contains a document retention schedule for all depts. / facilities.	9/2/2009 3:45 PM	Pakron, Michelle	9/3/2009 9:47 AM	102 KB
	FacilityListingLastSiteVisit	Facility Inspections & Site Visits	3 Year	This spreadsheet contains listing of facilities, last site visit & details of inspections.	9/2/2009 3:45 PM	Pakron, Michelle	9/3/2009 9:49 AM	64 KB
	FinalRenewal2009	Final Renewal 2009	1 Year	This spreadsheet contains a summary of the major portions of our insurance premium by fiscal year.	9/2/2009 3:45 PM	Pakron, Michelle	9/3/2009 2:52 PM	99 KB
	PolicyManual	Insurance Policy Summary	1 Year	This file contains a current listing on insurance policies that are in force.	9/2/2009 3:45 PM	Pakron, Michelle	9/3/2009 9:48 AM	262 KB
	pit073109-regions	Point in Time Report for July 2009	Permanent	This file contains our insurance losses valued at the end of the July for each of the last 3 fiscal years.	9/2/2009 3:45 PM	Pakron, Michelle	9/3/2009 9:51 AM	165 KB
	SOVrenewal2010	Property Insurance	5 Year	The file contains the property insurance value for	9/2/2009 3:45 PM	Pakron,	9/3/2009 9:46 AM	201 KB

Folders

To create a folder in your share library, go to the default view of your group share and select **New > Folder**. You can create folders wihin folders as well.