Adding or Editing a Document

Software Support - 2019-05-10 - Documents

Adding / Uploading a new Document:

1. Go to the folder where you want your document to appear.
2. Under the **Actions Menu**, click **Create a new item**, then click on **Document.**
3. Select the file(s) from your computer and click **Upload.**
4. On the next page, enter details such as the **Name** and **Description**.
5. You can control permissions and enable **Comments**, **Tasks** and **Related items**.
6. Use the options to ask for **Document Review or Comments** if applicable.
7. You can **Notify** the other workspace members that the document has been added.
8. Click **Save**.

   Kahootz tip: You can add more than one document at once!

   Adding a document with the same name as an existing document, instead of creating a new item, the file will be added as a new version of the existing document.

If you upload a ZIP file you'll get the option to either keep that as a single file or to expand it into the workspace. If your ZIP file contains folders and you choose to expand it, the folder structure inside your ZIP file will be created in your workspace. If the documents in the ZIP file already exist in your workspace, they will be updated with new versions.

It is possible to enable **Comments**, **Tasks** and **Related Items** now, or at a later date.

- Comments mean that you will be able to receive feedback from the users of the document, so you don't have to chase them to hear what they think!
- Adding tasks is a good way of keeping track of who has actually read the document; you can assign a task to a member, which they will have to mark as done once they have read it.
- Another useful tool is connecting items which have related content - this works well as a "See also" tool.

See Adding comments, tasks and related items to an item.

Editing a Document:

> **Kahootz Tip:** These steps below detail how-to edit a document via Kahootz without using the "direct 'edit in office' feature".

1. If the document is currently unlocked, click **Lock** so that other users cannot edit it while you are. If the document is currently locked, contact the person who has locked it, to find out when it will be available for edit.
2. Once you have locked the document, click on the document in question to download it.
3. Make the changes to the document and save to your computer.
4. Under Actions, click **Upload a new version of this document**. You will be taken through name, descriptions, permissions etc.
5. Click **Upload**.
6. Remember to click **Unlock**, so that others can now edit the document.

You can also edit documents through our 'Edit in Office' feature, for more detailed information on how to use this please see 'Edit in Office' KB article.

For more information on version control, see Document version control KB article.

Related Content

- Direct "View/Edit" for Documents via Microsoft 365 Online

- Document Review and Approval Process
- Getting started with documents
- Document Locking
- Maximum file size you can Upload or Download
- Direct "View/Edit" for Documents via Microsoft Office Desktop