



Where to find OnePlaceDocs

DESKTOP SHORTCUT

ON THE OFFICE RIBBON

ADOBE ACROBAT MENU

SYSTEM TRAY & TASK BAR



Saving content to SharePoint

The image shows a Windows desktop environment with two main windows open: OnePlaceDocs Explorer and Windows File Explorer.

OnePlaceDocs Explorer: This window displays a file tree on the left with folders like 'Kruger Projects' and 'Marketing Plan Matter'. The main pane shows a list of files with columns for Name, Document..., Example Ch..., and Manager. A green callout box points to the 'Upload' button in the top ribbon, stating: "Quickly add metadata and manage files as part of the bulk upload process".

Windows File Explorer: This window shows the 'Project Files' folder. A green callout box at the top says: "Drag & drop onto OnePlaceDocs: Easily transfer content to SharePoint from Windows File Explorer". A green arrow points from a file icon in the Explorer to the OnePlaceDocs Explorer window. Another green callout box points to the right-click context menu, stating: "Right-click menu: and 'Send to... SharePoint'". The context menu is open, showing options like 'Cut', 'Copy', 'Send to', and 'SharePoint'.

OnePlaceDocs - Save to SharePoint: A dialog box is open, showing the 'Location' and 'Properties' tabs. The 'Location' tab shows a tree of locations, including 'Kruger Projects'. The 'Properties' tab shows fields for 'Content Type', 'Title', 'Example Choice', 'Document Owner', 'Document Region', 'Review Date', and 'Manager'. A green callout box points to the 'Save' button, stating: "Quickly add metadata and manage files as part of the bulk upload process".



Managing SharePoint content

Create Favorite locations: Add locations you frequently save to

Manage SharePoint content: Perform actions such as Upload, Download, Move to, Delete and more...

Navigation tree: Easily access multiple locations in your SharePoint environment

Bulk edit item properties: Click and select multiple files

Check In / Check Out: Right-click on the file in OnePlaceDocs or use the ribbon / menu actions in Acrobat or Office

Heading 1

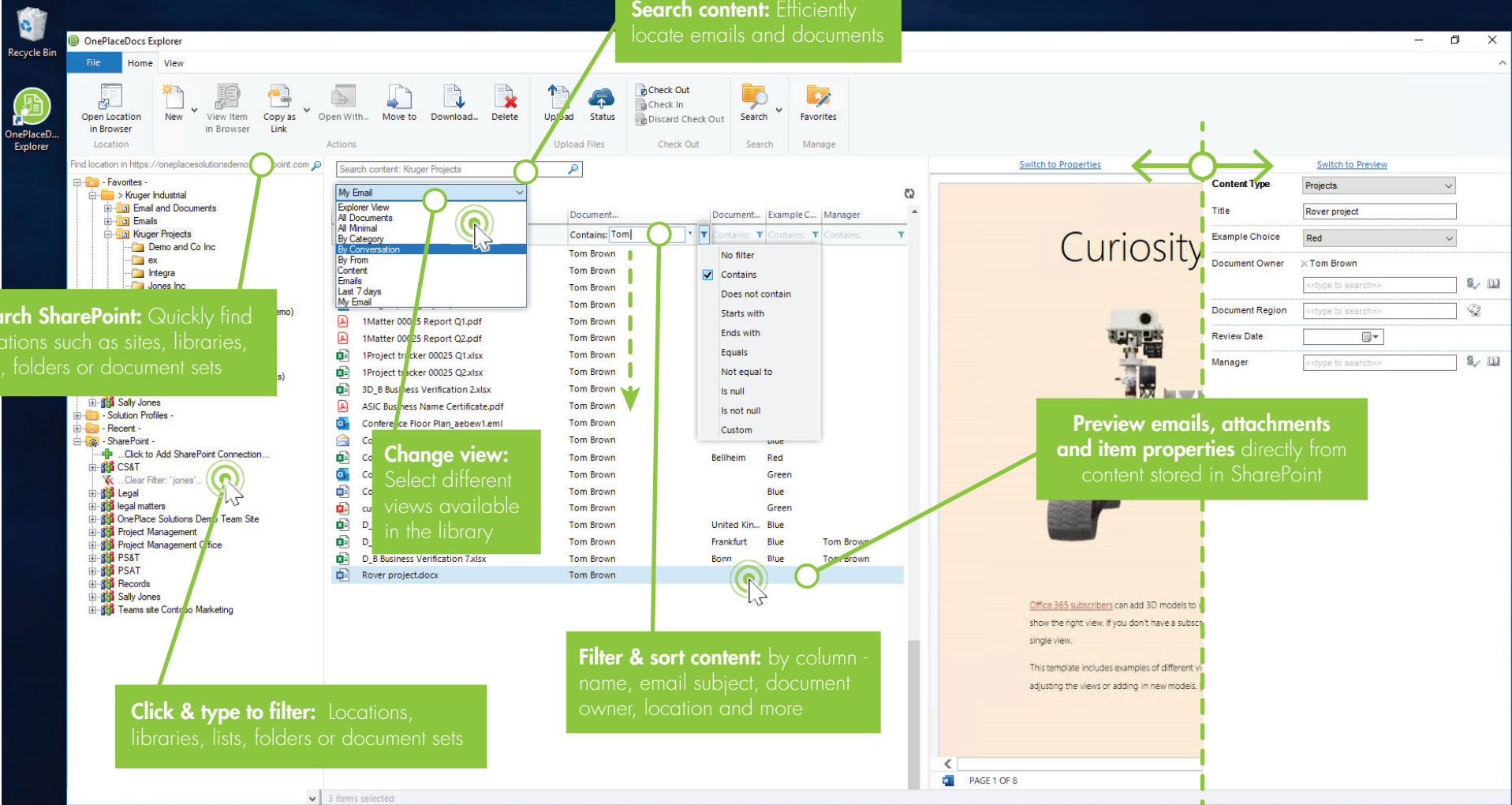
To replace the placeholder text on this page, you can just select it all and then start typing. But don't do that just yet!

First check out a few tips to help you quickly format your report. You might be amazed how easy it is.

Need a heading? On the Home tab, in the Styles gallery, just click the heading.

Name	Document Owner	Document Region	Example Choice	Manager
Project 4.xlsx	Tom Brown	Red	Tom Brown	Tom Brown
Project tracker 00062 Q1.xlsx	Tom Brown	Red	Sally Jones	Sally Jones
Project tracker 00062 Q2.xlsx	Tom Brown	Red	Sally Jones	Sally Jones
Project Tracker 25_n4n97g.eml	Tom Brown	Red	Sally Jones	Sally Jones
RE_Demo Files_ftu0ug.eml	Tom Brown	Red	Sally Jones	Sally Jones
RE_files_sm6kiz.eml	Tom Brown	Red	Sally Jones	Sally Jones
RE_OnePlace Solutions Demo...	Tom Brown	Red	Sally Jones	Sally Jones
Reminder_How to drive adopti...	Tom Brown	Red	Sally Jones	Sally Jones
Reports_trabcaht.msg	Tom Brown	Red	Sally Jones	Sally Jones
RFQ - Tender_1rak8httmsg	Tom Brown	Red	Sally Jones	Sally Jones
Rover project.docx	Tom Brown	Red	Sally Jones	Sally Jones
Sally Jones is inviting you to collaborate on Rec_jrkdi.eml	Tom Brown	Green	Sally Jones	Sally Jones
Supporting Documents for Tender bid_rtb187.eml	Tom Brown	Red	Sally Jones	Sally Jones
Tech news.docx	Tom Brown	Red	Sally Jones	Sally Jones
Terms and conditions.docx	Tom Brown	Red	Sally Jones	Sally Jones
test multiple_glsd1.eml	Tom Brown	Red	Sally Jones	Sally Jones
Upcoming changes_ntbvr8.eml	Tom Brown	Red	Sally Jones	Sally Jones
Updated training program_1rabc9os.msg	Tom Brown	Red	Sally Jones	Sally Jones
V2Conference party options.xlsx	Tom Brown	Red	Sally Jones	Sally Jones
Water report	Tom Brown	Red	Sally Jones	Sally Jones

Search and filter SharePoint content / locations



Search content: Efficiently locate emails and documents

Search SharePoint: Quickly find locations such as sites, libraries, lists, folders or document sets

Change view: Select different views available in the library

Click & type to filter: Locations, libraries, lists, folders or document sets

Filter & sort content: by column - name, email subject, document owner, location and more

Preview emails, attachments and item properties directly from content stored in SharePoint

The screenshot shows the OnePlaceDocs Explorer interface. The left sidebar displays a tree view of SharePoint locations. The main area shows a search results list for 'Kruger Projects'. A context menu is open over the list, showing options like 'No filter', 'Contains', 'Does not contain', 'Starts with', 'Ends with', 'Equals', 'Not equal to', 'Is null', 'Is not null', and 'Custom'. The right sidebar shows the 'Curiosity' document preview with its properties.