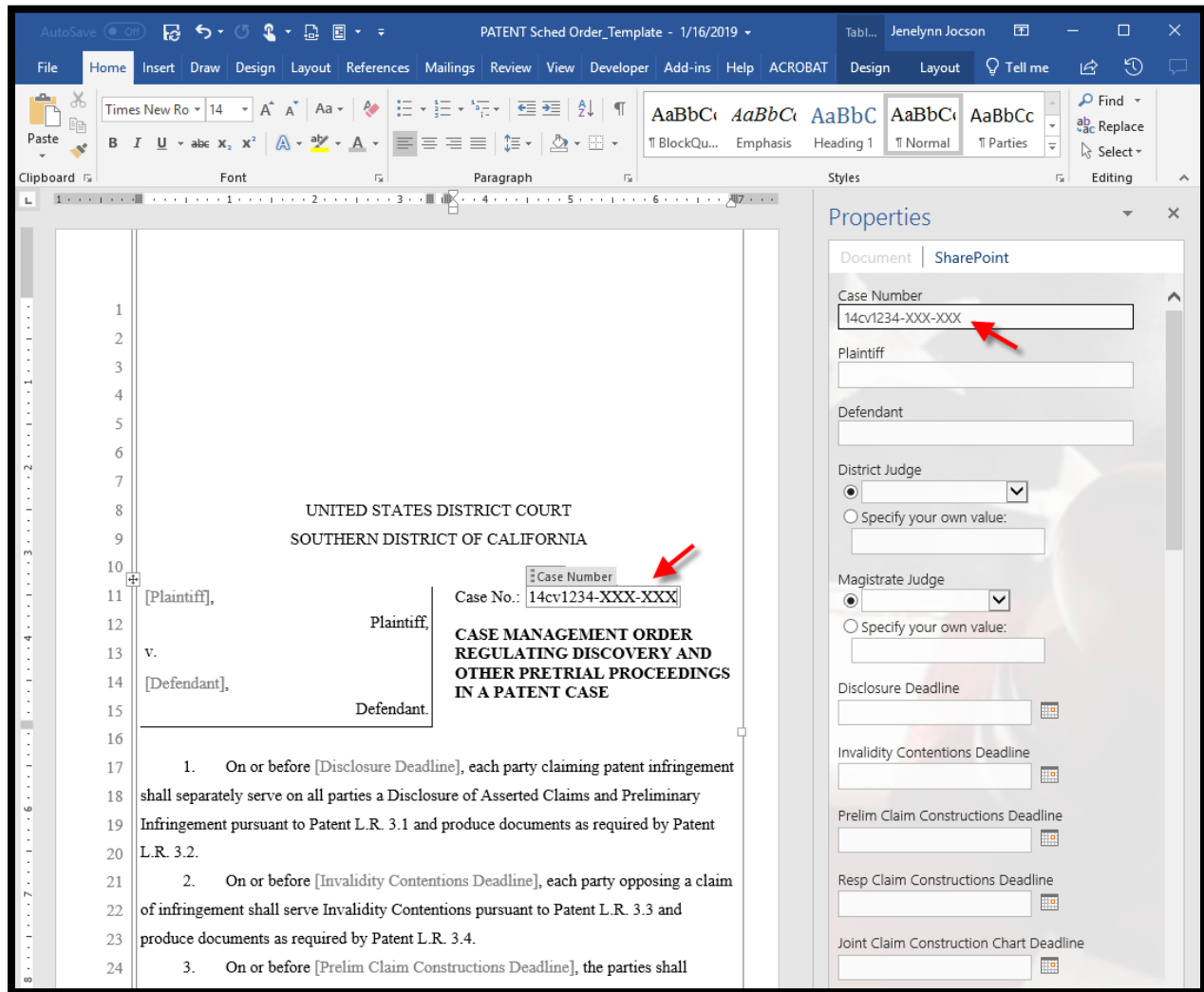


## CASD Office 365 Migration 2019 New SharePoint Properties Panel

When accessing your Microsoft Word templates from a library within your Chambers SharePoint site (via Internet Explorer), you will now have access to the **SharePoint Properties Panel** located to the right of your template. *This new feature replaces the Document/Template Information Panel which appeared above your template and below the Word Ribbon.*

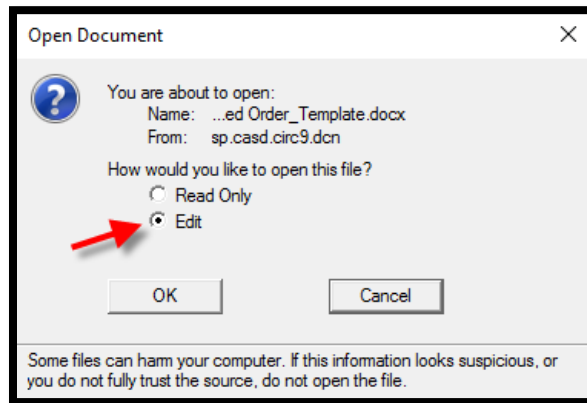


**Entering case information will remain the same.** Case information added to the SharePoint Properties Panel will automatically populate applicable fields within your Word Documents (e.g. Case Number). Date fields can be populated by selecting a date from the calendar icon. Information automatically populated into your Word Document from the panel can be updated through the panel or the document itself. Information can also be modified or completely deleted from the Word Document, if needed.

**PLEASE NOTE:** The SharePoint Properties Panel will NOT appear when templates are saved and accessed outside of SharePoint (e.g. saved on your desktop, saved within an i: drive folder).

Your **fillable template fields** will only be available when accessing templates from SharePoint in EDIT mode. To properly access your template with the SharePoint Properties Panel:

1. Select the template from your SharePoint library.
2. From the Open Document Dialog box, select "Edit".



**REMEMBER TO “SAVE AS”.** Once you've populated all your template fields, select **SAVE AS** to ensure you do not save over the original template you share with your colleagues.

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**Microsoft Word INFO Tab:** When accessing Word documents from an email, a network folder, or your desktop (created from original templates with SP Properties), you may be prompted with the document “Info” tab. To exit out of this tab and view your document, select the back arrow (*left pointing arrow*) at the top of your screen.

