

Help

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Ribbon icons



Opens a dialog form with a dwg filter which enables to open dwg files stored in your SharePoint document library. See also [Open or edit a file in a SharePoint library](#) and [Opening a drawing from Revit](#)



Opens a dialog form with a dwg filter which enables to save the current dwg drawing to a SharePoint document library. See also [Save a file to a SharePoint library](#)



Checks in the current drawing. See also [Check in a file to a SharePoint library](#)



Checks out the current drawing. See also [Check out a file from Revit](#)



Undo or discard the current checked out drawing. See also [Undo check-out and discard changes in a SharePoint library](#)



Makes possible to edit the current checked in drawing without checking it out unless a document library requires files to be checked out for editing, checked in files are opened as read only by default.



Display your drawing version store in your SharePoint document library. See also [Introduction to versioning](#)



Display your current drawing SharePoint properties.



Opens a dialog which enables to search for drawings text properties within the current document library. To look for an exact phrase, enclose your search criteria with double quotes, e.g. "My drawing".



Opens the Options dialogs to setup the plugin preferences. See also [Change the location where you work on check-out files](#) and [User Preferences](#)

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Check a file in or out of a SharePoint library

Overview

Checking out files before working on them helps to avoid conflicts and confusion when multiple people are working on the same set of files. When a file is checked out to you, only you can make changes to it. You can check out any file on a SharePoint site for which you have permission, and you can check out files directly from Revit using this plugin.

When you check in a file, you can type comments about the changes that you made to the file. This helps people to understand what has changed in the file from version to version. This is especially helpful if several people work on a file or if the file is likely to go through several revisions. If your library tracks versions of files, your comments become a part of the version history of the file, which can be helpful if people need to view or restore a previous version.

Your organization may require you to check out a file before you edit it. When check-out is required, you must check in a new file when you create it in a library or upload it to a library.

While a file is checked out to you, the changes that you make are not visible to others until you check the file back in. There may be situations in which you want to check in the file so that others can see your changes, but you want to keep the file checked out so that you can continue working on it. When you check in a file, you can choose to continue working on the file, unless your library tracks both major and minor versions and you are checking in a major version. A major version usually has changed significantly since the previous major version, whereas a minor version usually has changed only slightly since the previous version. For example, a major version may include a large portion of new content, whereas a minor version may include only corrections to spelling errors.

When you use this plugin to check out a file on a Microsoft Windows SharePoint Foundation/Server site, the file can be stored on your hard disk in a drafts folder that is in your My Documents folder. You can change this location to another location on your hard disk or network, or you can specify that checked-out files are stored on the Web server when you work on them.

When you check out a file from a Microsoft Windows SharePoint Foundation/Server site, the file is stored on the server while you work on it, but you must still check in the file before others can see your changes. In most cases, when you check out a file from a Windows SharePoint Foundation/Server site, your file will be stored in your draft folder specified in the plugin Options menu.

If both major and minor versions of files are being tracked, you may be prompted to choose whether you are checking in a major version or a minor version.

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Check out a file from a SharePoint library

Use this procedure to check out a file that is already open in Revit. You can also check out a file from the library on the SharePoint site.

Push  on the plugin ribbon.

Tip You can change the options for working with checked-out files, located in the plugin Option menu.

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Check in a file to a SharePoint library

Use this procedure to check in a file while it is open in Revit. You can also check in a file from the library on the SharePoint site.

Push  on the plugin ribbon.

If you are prompted whether to check in a major or minor version, click Minor version if you made a minor change or Major version if you made a major change.

In the Version Comments box, type any comments that you want to make about your changes.

These comments appear as part of the version history for the file in the SharePoint library, which can be helpful if you or someone else needs to view information about previous versions.

If the Keep the document checked out after checking in this version check box is available, you can select it if you plan to keep working on the file.

This option is available if your library does not track versions, if it tracks all versions the same way, or if you are checking in a minor version. This option is not available if you are checking in a major version or publishing a file.

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Change the location where you work on checked-out files

This setting changes the location where you work on the next file that you check out. If you are currently working on a checked-out file, this procedure does not change its location.

Click the plugin Options.

In the Offline editing options for document management server files section, do one of the following:

Use the following procedure to work with checked-out files on your hard disk or on a network location:

Under Save checked-out files to, click The server drafts location on this computer.

In the Server drafts location box, type the location on your hard disk where you want to work with checked-out files, or click Browse to find the location.


To work with checked-out files on a Web server, under Save checked-out files to, click The web server.

When you choose this option, you work with your checked-out files on the Web server or site where your files are stored. You cannot customize the specific location.

Click OK.

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Undo check-out and discard changes in a SharePoint library

On the plugin ribbon press .

When you are asked whether you want to discard the check-out, click Yes.

Tip: You can also discard the check-out by using commands in the library on the SharePoint site.

See Also

[Check a file in or out of a SharePoint library.](#)

[Open or edit a file in a SharePoint library.](#)

[Save a file to a SharePoint library.](#)

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Open or edit a file in a SharePoint library

Overview

Checking out files to work on them

If multiple people work on the same files, you may want to check out files before you work on them. When you check out a file, you are the only person who can change it while it is checked out to you. This reduces the potential for confusion or editing conflicts. A file must be checked in before other people can see the changes.

A library can be set up so that it requires check-out. When a library requires check-out, you must check out files before editing them. New files must be checked in before other people can see them.

Working with files on your hard disk

When you check out a file using the plugin and the file is in a library on a Windows SharePoint Foundation/Server site, you can work with the file on your hard disk in Revit. In most cases, this is faster than working with the file on a server. The file is stored in the server drafts folder on your hard disk; you can change this location through the options for saving in the plugin Options button.

When you check out a file to your server drafts folder, you can even work with a file when you aren't connected, such as when you are

away from the office. When you are connected again, you can update your changes on the server. If you checked out the file, you need to check in the file to enable other people to see your changes.

Open a file from a SharePoint site

Note: Your site may be customized differently, but you can use the following guideline in most cases to determine which version of Windows SharePoint Foundation/Server is running on the site: On a Windows SharePoint Foundation/Server site, a menu with your user name or account appears in the upper-right corner.

On the SharePoint site, open the library where your file is located.

What to do if you can't find your library

If the name of your library does not appear, do the following:

On a Windows SharePoint Foundation/Server site, click View All Site Content.

Click the name of your list.

Click on the drop-down list next to the file that you want to open.

Select Edit in Autodesk Revit to start editing the file.

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Edit a file by opening it from a SharePoint site

To open a dwg Revit file from a Windows SharePoint Foundation/Server site, you can just click the file. To edit a file on a site running Windows SharePoint Foundation/Server use the editing command that appears in the drop-down list for the file and select Edit in Autodesk Revit.



Note: If you do not see the option above, follow the instructions on the plugin Readme file, make sure you have administrative privileges on the SharePoint server.

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Opening a drawing from Revit


On the plugin menu, click Open.


If you have not open a file previously, type the document library entire path, e.g. <http://servername/Document Library name>.

This path location will be remembered next time you open a file. To save file locations, you can add to your favorites by clicking the  button and navigate to them by using the  button.


Once you have navigated to the document library, select the file and hit the Open button.

Available for versions 2025 and above, there is the  and the  buttons to list all document library files.

The  called Flat View was introduced to overcome 5K file view limitation and it will allow to search for files which metadata is registered as "managed property". More information about managed properties can be found at <https://docs.microsoft.com/en-us/sharepoint/technical-reference/automatically-created-managed-properties-in-sharepoint>

The  called Light View was introduced to be able to navigate fast using the latest SharePoint tools, it gives the document status like checked out by and locked by. You can open and save files using this view.

Tip: The last 10 files that have been opened or saved are listed in the file name box, just click the chevron on the right to display the recent drawings, select the one needed and hit the Open/Save button.

You can also open and search for files by clicking on the  button. Searches are made to every SharePoint drawing text property used by the document library default view. Type several words to narrow your search. If you need to look for an exact phrase, enclose your search words with double quotes e.g. "My drawing".

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Save a file to a SharePoint library

Overview

A SharePoint site or document management server can provide a central location for people to manage and track files. For example, you can use a SharePoint library to manage versions of files, store additional information about files, and receive updates when the files change. Some document management servers also provide workflow features to help manage business processes, such as review and approval.

This plugin provides an option to make it easier to find your available SharePoint libraries, saving to a library is similar to saving to any network or Web location.

To save a file to a SharePoint site, you must have permission to contribute to the SharePoint site. Other people in your group also need permission to read or contribute. For example, to save a file to a document library on a SharePoint site, you need to have permission to contribute to the library.

When you save a file, you may be prompted to provide additional information or perform other actions, depending on how your site or server is set up. For example, you may need to enter information about the file, such as your department name or the content type of the file. For more information, see the administrator or owner of your site.

If a file is checked out to you, which means that only you can make changes to it during check-out, you must check the file back in

before other people can see your changes. If your library tracks major and minor versions, you are prompted when you check in the file to specify whether you are checking in a major version or a minor version. A major version usually has changed significantly since the previous major version; whereas a minor version usually has changed only slightly since the previous version. For example, a major version may include a large portion of new content, whereas a minor version may include only corrections to spelling errors.

Depending on how your library is set up, you may have additional steps to take before you make your files visible to others. For example, you may need to specify information about the file, or your file may need to be approved before it is visible to everyone in your group.

In addition to saving a file directly to a SharePoint library, you can also save the file to your hard disk and then save or upload it later to a library or another Web location.

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Save a file to a SharePoint library

The following procedure is for saving your file to a SharePoint library or another location for the first time. After you save a file for the first time, you can click Save as you do for any file.

To save a file for the first time, on the plugin ribbon push the  button.

If you like to save the file to a different location, on the plugin ribbon, click Save As. If you see the name of the server or site that you want to save the file to, click it, and then click Open, otherwise type the entire document path e.g. http://servername/Document Library Name and hit Open.

Tip: You can also double-click the name.

Click the name of the library or other location that you want to save the file to, such as Shared Documents, and then click Open.


Tip You can also double-click the name of the library or other location.

In the File name box, type a name for the file.

Click Save.

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Introduction to versioning

Versioning enables you to store, track, and restore items in a list and files in a library as they are changed. Access the file version history by clicking on the  button on the plugin ribbon

Overview

When versions are tracked for lists or libraries, revisions to the items or files and their properties are stored. This enables you to better manage content as it is revised and even to restore a previous version — for example, if you make a mistake in the current version. Versioning is especially helpful when several people work together on projects, or when information goes through several stages of development and review.

You can use versioning to do the following:

- **Record a version history** When versioning is enabled, you can see when an item or file was changed and who changed it. You can also see when properties, or information about the file, were changed. For example, if someone changes the due date of a list item, that information appears in the version history. For files, you also see comments that people include about their changes.
- **Restore a previous version as your current version** Did you make a mistake in a current version? Or perhaps you need to restore part of a document that you deleted. You can easily replace your current version with a previous version. Your current version then becomes part of the version history.
- **View a previous version:** You can view a previous version — for example, to refer to a previous guideline — without overwriting your current version.

Libraries can track both major versions, such as those to which a new section was added, and minor versions, such as those in which a spelling error was corrected. Lists can track only major versions. Lists and libraries can also limit the number of versions that people can store.

To enable versioning, you must have permission to design a list or library.

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When versions are created

When versioning is enabled, versions are created in the following situations:

- When a list item or file is first created or when a file is uploaded.

Note: If file check-out is required, the file must first be checked in, in order to create its first version.

- When a file is uploaded that has the same name as an existing file and the Add as a new version to existing files check box is selected.
- When the properties of a list item or file are changed.
- When a file is opened, edited, and saved. A version is created when you first click Save. This version is updated with the latest changes that you make to the file before closing it.

Note: A version is not created every time that you or another user clicks Save, because this would create too many versions.

- When a file is checked out, changed, and then checked back in.

Note: If you or another user discards the checked-out version, no version is created.

You can choose to delete a single version of a file — for example, if you know that you made a mistake in that version — which removes that version from the version history. However, if you delete the actual file, all of its versions are deleted with it. By default, when you delete a version, the version is sent to the Recycle Bin, where it can be recovered until it is permanently deleted. Your organization may handle deletions differently, however.

Important: If your organization limits the number of versions that it stores, the oldest versions are permanently deleted when the limit is reached. They are not sent to the Recycle Bin.

Working with major and minor versions

Depending on the needs of your organization, your library may be set up with simple versioning, which tracks only major versions, or it may track both major and minor versions. If people in your group don't often work on several revisions, your organization may only need simple versioning. If many people work on files together and usually create several versions, your organization may want to track both major and minor versions.

Providing two types of versions can help your team to better manage its content. People who work with the content can better understand the current status of a file. For example, a major version is usually one that is ready for a larger group to see and review, whereas a minor version is a draft that someone is still working on.

Tracking both kinds of versions also helps to make the version history more meaningful. A major version is more likely to represent a milestone in the file's development, such as when a file is submitted for review or distributed to others. A minor version is typically used as a routine increment, such as a version that you save or check in while you are still writing the content, or a version in which you correct some minor errors. When you want to view the version history of a file, the major versions may help you to identify the stages of the file's development and make the history easier to browse through.

When major and minor versions are tracked, a version is stored by default as a minor version, unless you designate the version as a major version. When you save a file and close it, the version is tracked as a minor version. You must first publish the file in order for it to become a major version. You can publish the file by using drop-down commands in a library. In some programs that are compatible with Microsoft Windows SharePoint Foundation/Server, you can also use commands in the program. By default, each major version can have up to 511 drafts (minor versions), but the site administrator or owner can further limit the number of versions.

If you have permission to delete versions, you can overwrite a minor version with another minor version. For example, you may want to overwrite a version if you know that the previous version contains an error and you don't need to keep it. If you publish a major version and then realize that you made a mistake, you can turn the version into a minor version again by unpublishing it.

If you check out files before working on them, you can designate which type of version you are checking in. You do not have to publish a file if you designate it as a major version when you check it in.

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Version numbering

Versions are numbered as you create them. In a list or in a library with simple versioning enabled, version 1 is the first version that you create or upload, and the version number increases by increments of whole numbers, as in version 2, version 3, and so on.

When you track major and minor versions, the major versions are whole numbers, and the minor versions are decimals. For example, 0.1 is the first minor version of a file, 1.3 is the third minor version of a file that was published once, and 2.0 is the second major version of a published file.

No. ↓	Modified	Modified By	Comments
This is the current published major version			
2.0 1	5/15/2009	Nina Vietzen	Legal Review
1.3	5/14/2009 Due date	Vanessa Garcia 6/9/2006	changed due date
1.2 2	5/13/2009	Mike Miller	Updated figures
1.1	5/11/2009	Vanessa Garcia	Fixed some typos
1.0	5/10/2009	Dave Natsuhara	ready for first review
0.2	5/10/2009	Mike Miller	Inserted chart
0.1 3	5/10/2009	Dave Natsuhara	added sales data

1- The current published major version is highlighted, and the version number is a whole number.

2- A version is created when properties or metadata changes.

3- The first version of a file is always minor version number 0.1.

In a list or library, you can display a Version column that displays the version number of files or list items, which can be helpful if your team frequently revises information.

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How versioning works with content approval

Major and minor versioning integrates with content approval for lists and libraries.

When content approval is required, a list item or file remains in a draft or pending state until it is approved or rejected by someone who has permission to approve it. If the item or file is approved, it is assigned an Approved status in the list or library, and it is displayed to anyone with permission to view the list or library. If the item or file is rejected, it remains in a pending state and is visible only to the people with permission to view drafts.

When you enable major and minor versioning in a library that requires content approval, you can also add a workflow, if you or someone in your organization has created one. A workflow controls how your files move through business processes, such as review or approval. You can use a workflow to manage the approval process when major versions are checked in.

By default, in a library that tracks both major and minor versions, you must first publish a major version of a file before it can be approved. Minor versions are considered drafts that are still being developed, so they don't appear as pending items that are waiting for approval.

For example, a travel agency might use a document library to manage files. While team members develop a new sales proposal, they track minor versions of the file. If they make a mistake in one version, they can restore it to a previous version. When they finish the proposal, they can create a major version and then publish it for approval by their legal department and their manager. When the file is approved, other employees in the company can view the file.

By default, a pending item or file is visible only to its creator and to the people with permission to approve items, but you can specify whether other groups of users can view the item or file.

When content approval is required, the people who have permission to read content but who do not have permission to see draft items will see the last approved or major version of the list item or file. If major and minor versions are tracked in a library and no one has published a major version yet, the file will not be visible for the people who do not have permission to see draft items.

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How versioning works with file check-out

Checking out files make the most of versioning. When you check out a file, a version is created only when you check the file back in, so that you can specifically designate when a version is created. When check-out is not required, a version is created when you first save a file, and then this version is updated when you close it. If you open and save the file again, another version is created. Depending on the situation, you might not intend for multiple versions to be created, for example, if you have to close a file to attend a meeting before you finish making changes to the file.

When check-out is required, you cannot add a file, change a file, or change the file's properties without first checking out the file. When you check in the file, you are prompted to provide comments about the changes that you made, which helps to create a more meaningful version history.

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User Preferences

Open checked in document as read only

When opening a checked in drawing it is opened as read-only by default then a message explaining how to edit the drawing is displayed. To suppress this message and open a checked in drawing for editing by default, uncheck this option. Note that by unchecking this option the drawing will be locked by you as long as it is opened.

Use a single folder for working files

Check this option if you receive errors because of a long path. All opened drawings and their external references will be downloaded in the same local folder. See notes in [Known limitations](#) section.

Check out and open

It will automatically check out a document if possible before opening it. Note, it will not check out the drawing to a draft location if selected.

Auto Check-In on Close

It will automatically check in the document as a minor version when the checked out document is closed. Note, for checked out offline documents, this method does not work, the user must check in the document manually using the check-in button before document is closed.

Enable Worksharing

Use this option to activate worksharing capabilities to this plugin. Please refer to the Worksharing section of the product help located at the left panel.

Add a SharePoint network location

This will open a browse folder dialog to select a particular folder that will add a shortcut to the SharePoint folder under the "This PC" Windows explorer. Using this shortcut will enable file insertion using the application regular insert dialogs. Use this option only for specific cases like inserting external references or other operations not available with this application. SharePoint access using this link may lead to inserted file corruption since it does not have the reliability of the native SharePoint check-in/out file locking control, so this is preferred for read-only file inserts.

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Known limitations

Special characters:

Saving drawings with file names that contains characters like # or & are not allowed. This is a SharePoint limitation, for a complete description see <http://support.microsoft.com/kb/905231> .

Launch from SharePoint support:

Support is only available from the "Edit in Autodesk Revit" menu as described on the readme file.

Version operations:

There are not message descriptions for operations not allowed like erasing a published version.

When the "Use a single folder for working files" option is activated:

1. Cannot "save as" a file located in SharePoint using the same name. Workaround, save the file under a different name.

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Additional Notes

- Using Onedrive to sync the files files you are working with this plugin in SharePoint is not recommended. Lost of work may happens.

Configuration Notes

None on this version

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