

SPO Members - Document Libraries User Guide

Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

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This document provides instructions and support for utilizing the many features available in SharePoint Document Libraries.

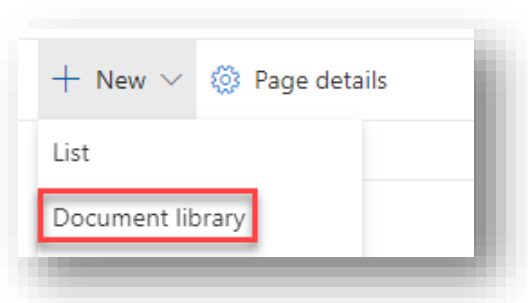


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Create a new document library

- To add a new document library to your site, click “+New” on your site home page and select document library.



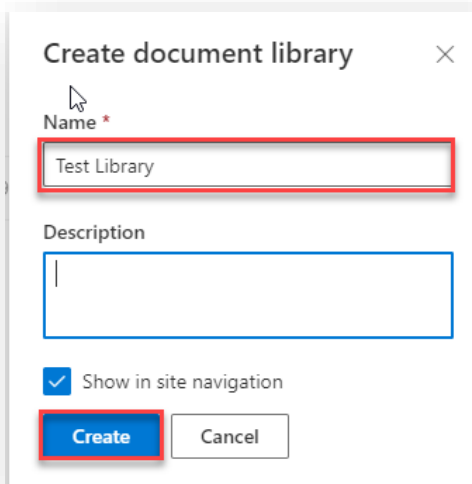
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- Enter “Name”, Description (optional) and click “Create”.



Create document library [X]

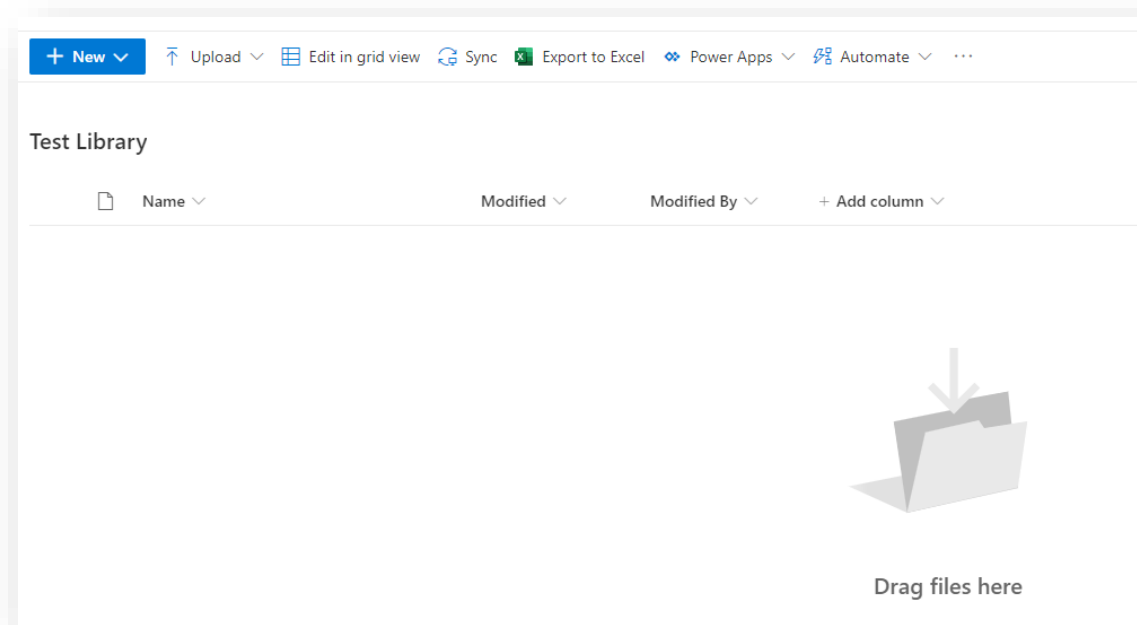
Name *

Test Library

Description

Show in site navigation

Create Cancel



Managing your document library

- You can upload or drag and drop existing documents from your computer into your document library. New files can also be created from within a document library. All these methods have been described below:

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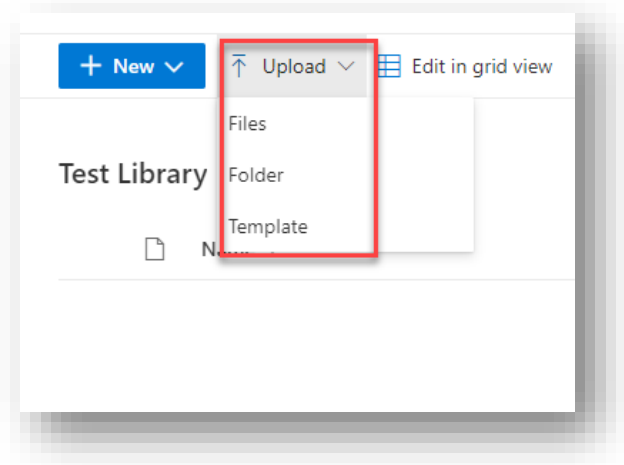
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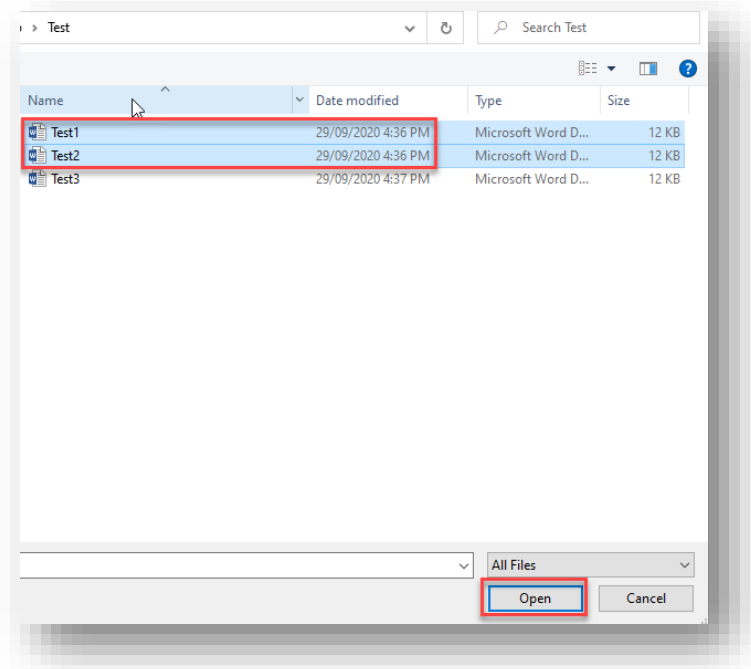
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Upload

- To upload an existing file or folder, click **“Upload”** >> **“Files”** or **“Folder”**.



- Select files on your computer and click **“Open”**.



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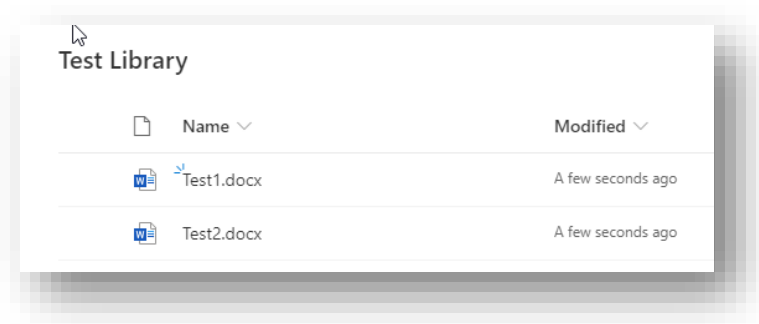
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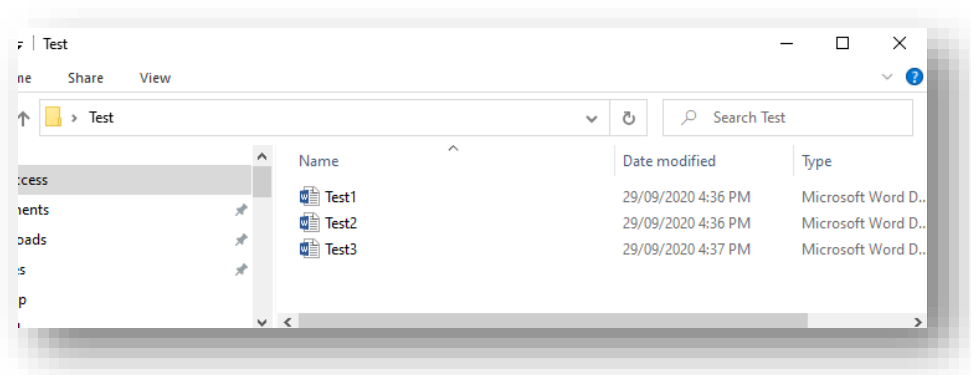
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Drag and Drop

- To drag and drop the files from your system, navigate to the folder or files on your system.



- Select files that you want to upload. Drag the files to the space in the SharePoint library where it says “**drag files here**”. You will see “**Drop here**” when you hover the file over library.

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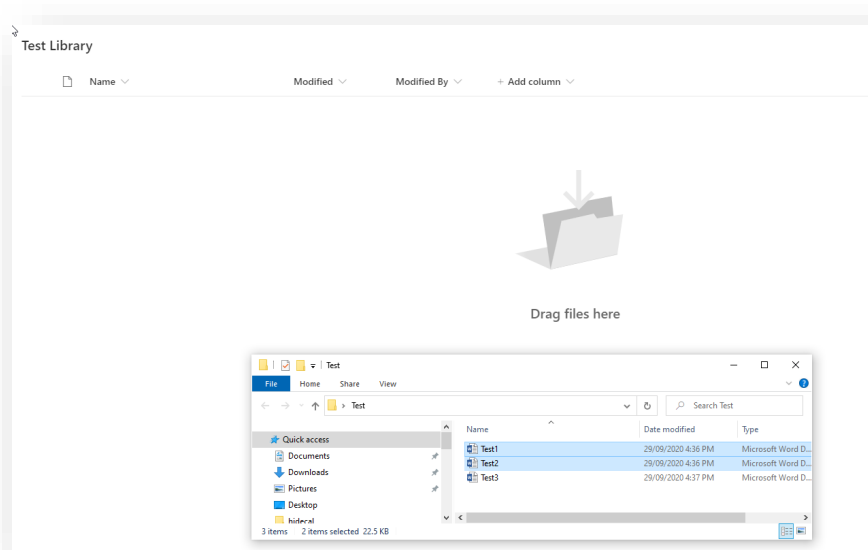
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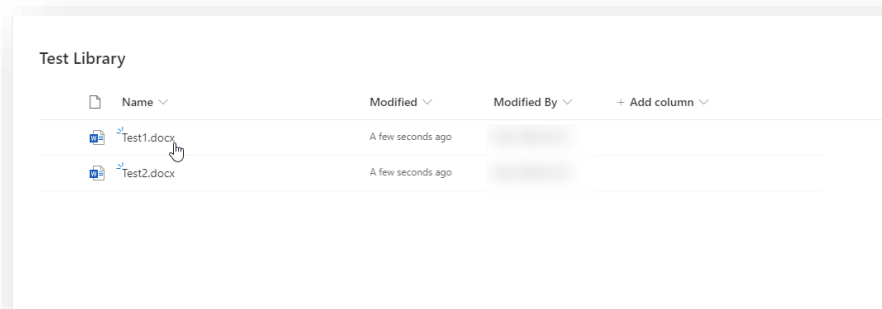
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- You should see these files in the Document library.



Create a new file

- To create a file directly from the library, click on **“New”** and then select the type of file you wish to create.

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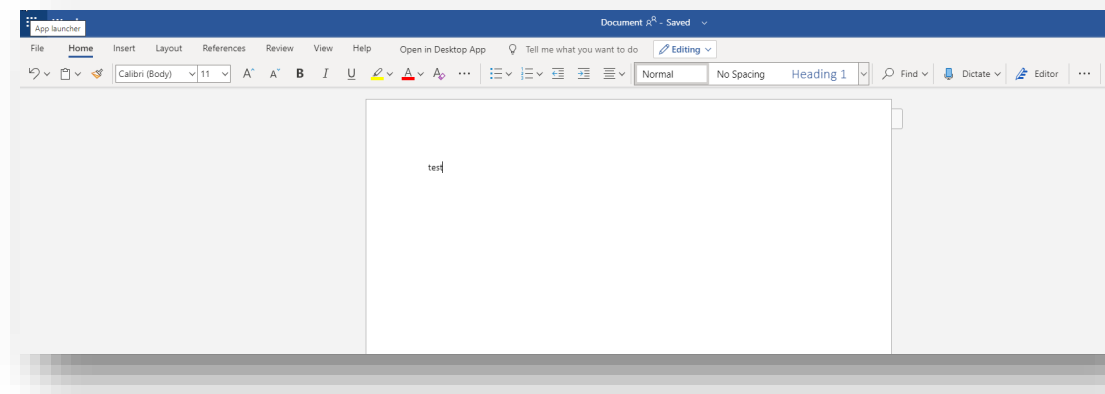
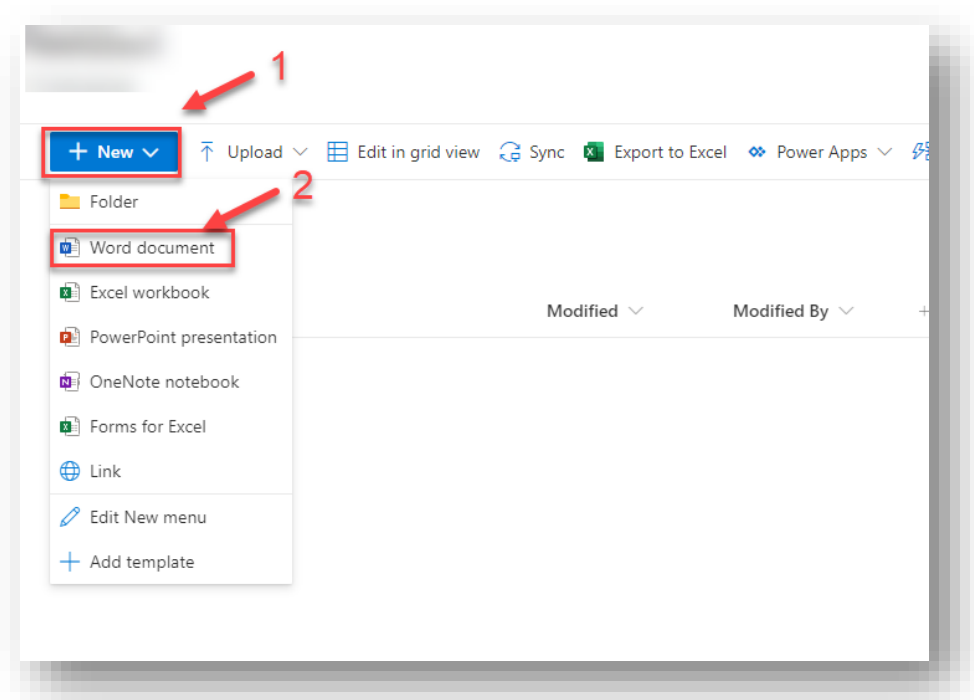
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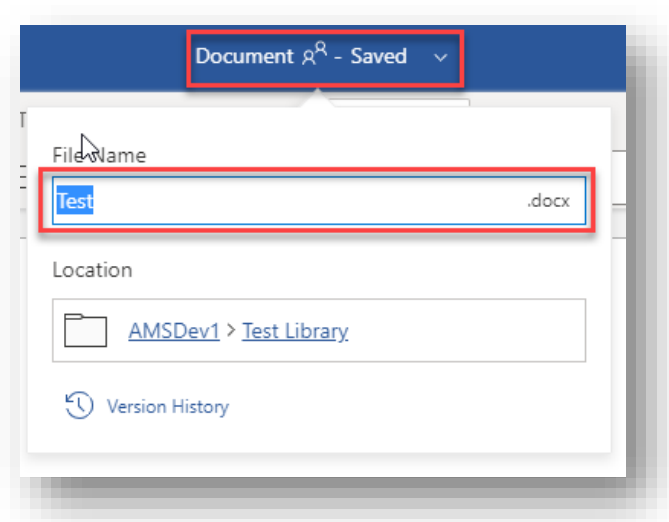
- Click on existing document name on the top bar to change file name.

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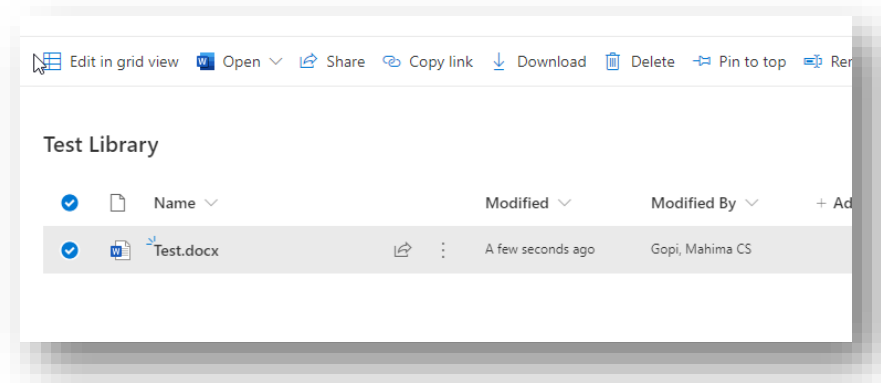
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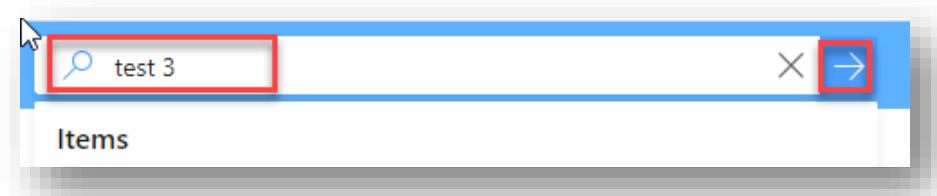


- Close file when you are done and it will appear in the document library.



Search Documents

To search a particular document, type search text in the search box on the top and press “Enter” or arrow beside the search box.

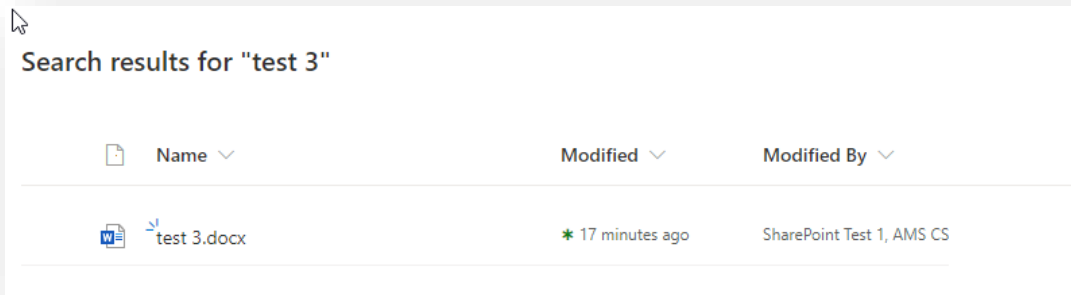


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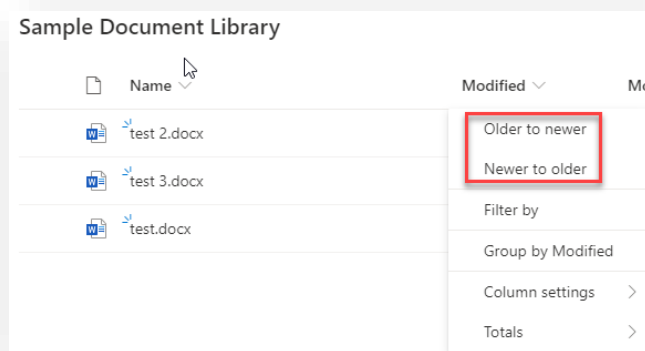
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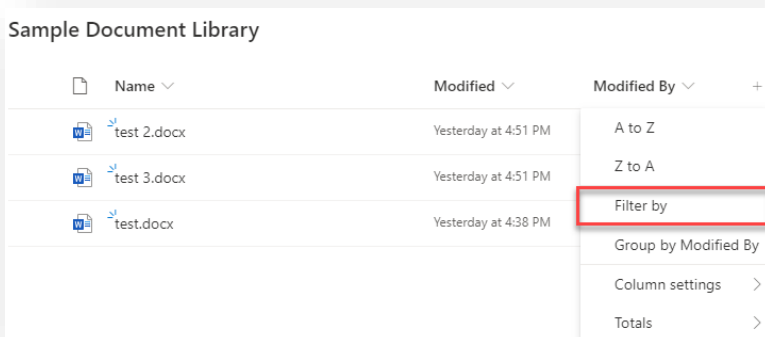
Sort Documents

- To sort documents based on a property or column, click on the column name and select sorting order. See image below.



Filter Documents

- To filter documents, click on column name and select "Filter By" from the menu.



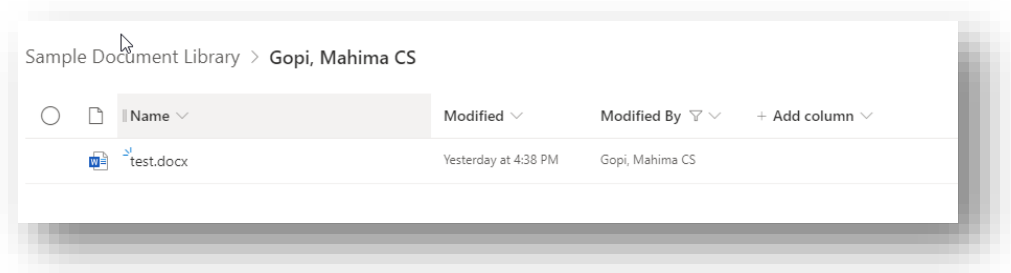
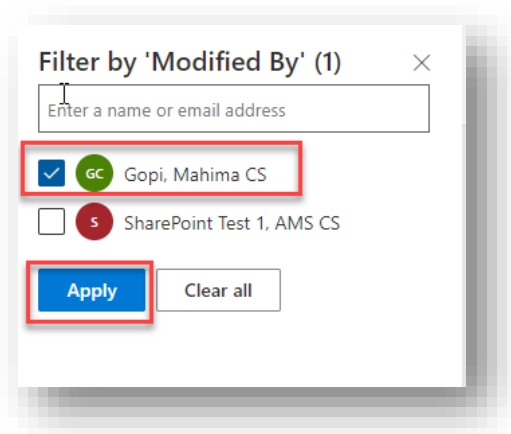
- Choose the value(s) you want to filter by and click "Apply".

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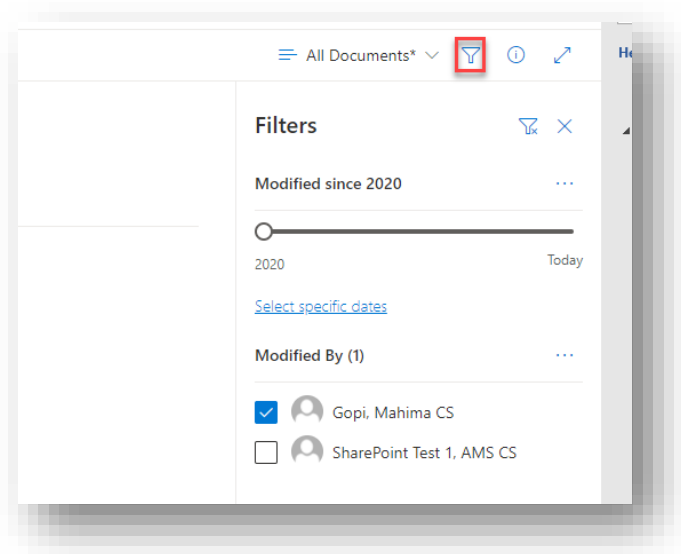
This document provides instructions and support for utilizing the many features available in SharePoint Document Libraries.



- Filter can be applied to multiple columns.

Filters Pane

- To open the filters pane, click on  on the top right. Filters can also be set or removed from here.



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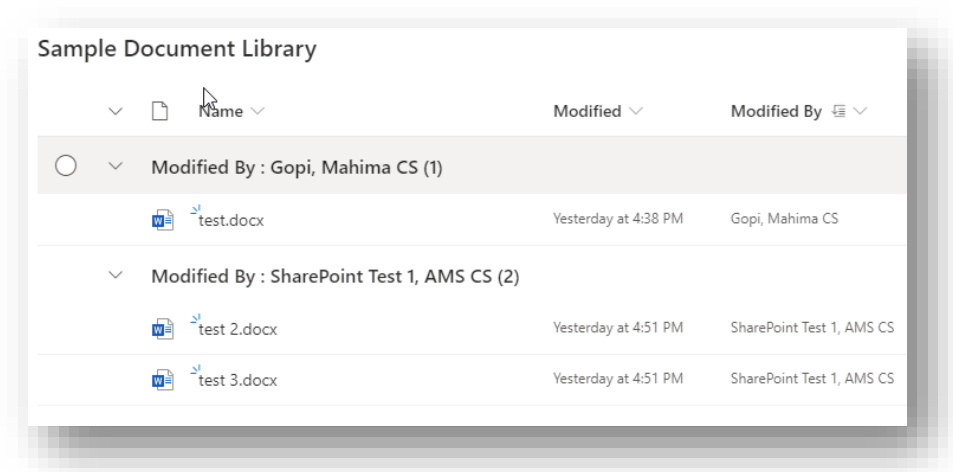
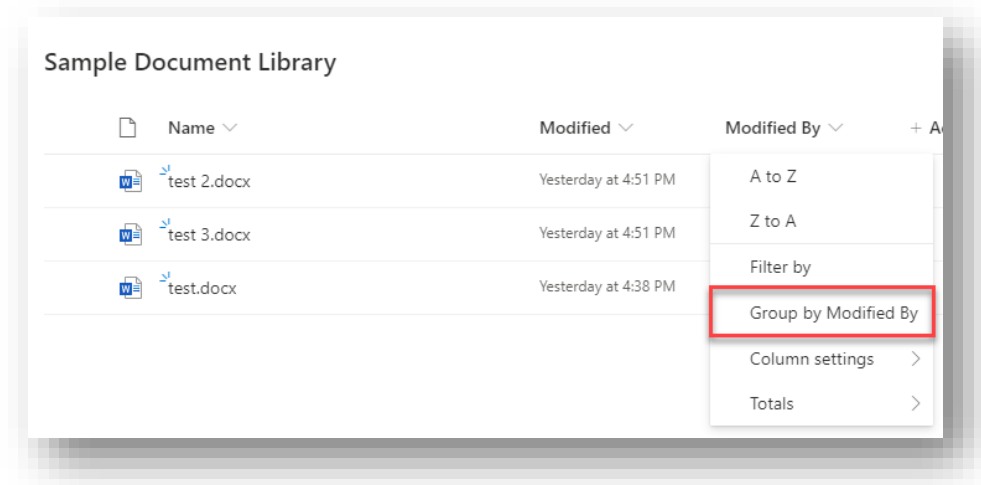
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Group Documents

- Documents can be grouped based on a column value. To group documents, click on column name and select “Group By” from the menu.



Show Totals

- To show totals for a column, click on column name and select “Totals”. Choose the type of count you want to show for the column.

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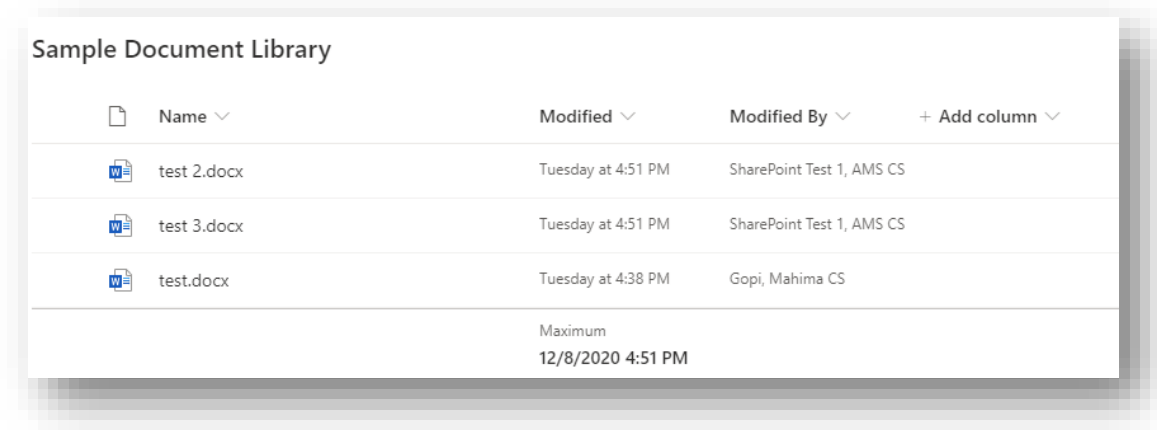
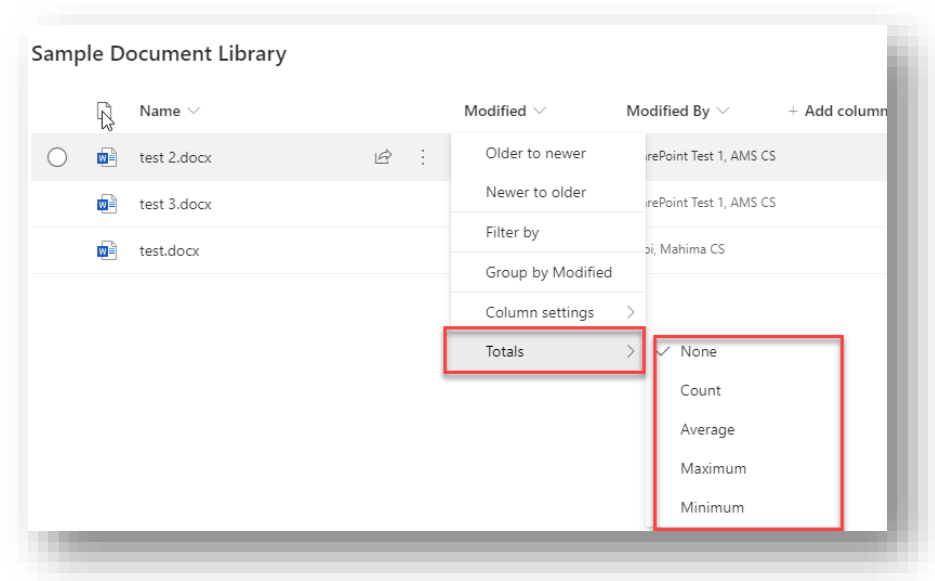
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Edit View

Show/Hide Columns

Hide Column from view

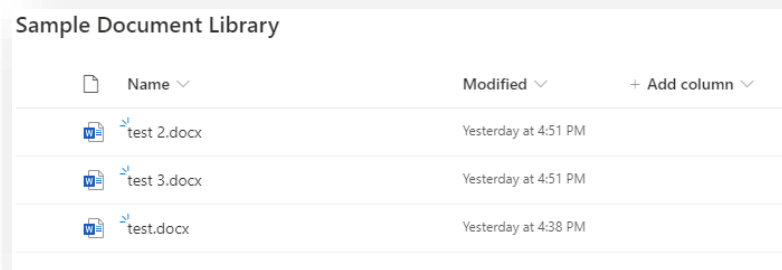
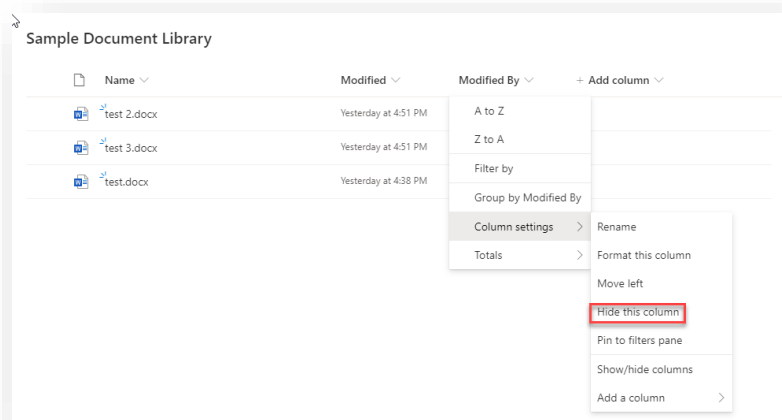
- To remove a column from the view, click on column name and select “Column Settings” >> “Hide this column”.

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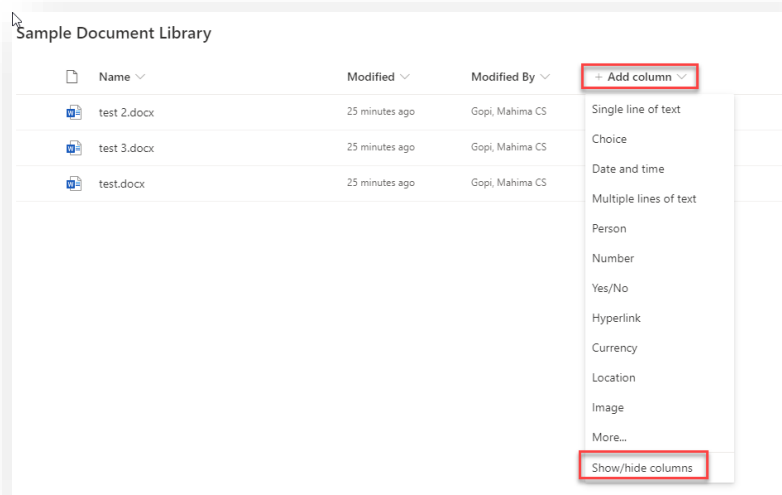
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Add Column(s) to view

- To add more columns in the view, click on “Add Columns” >> “Show/hide columns”.



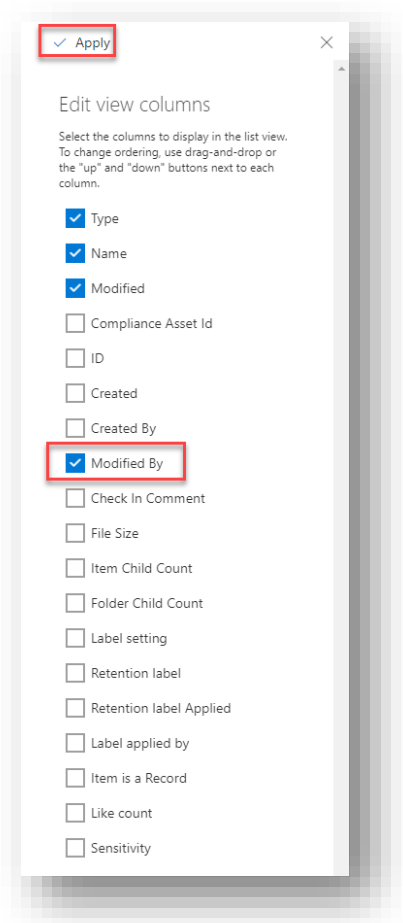
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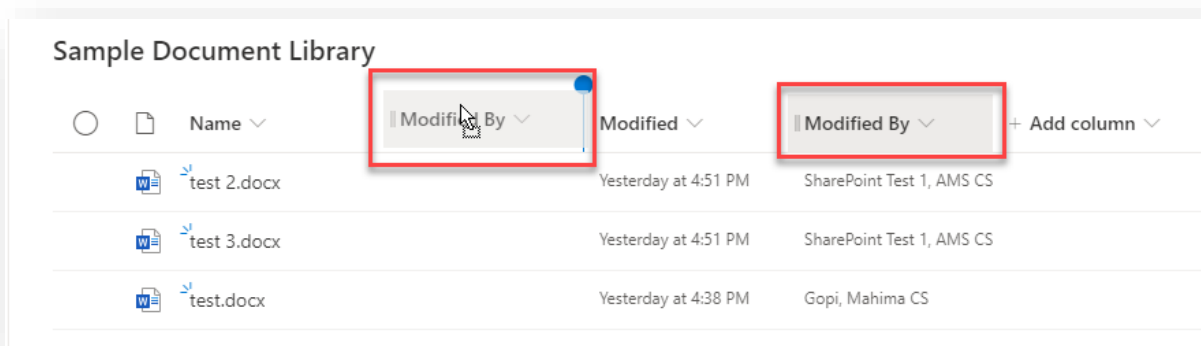
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- Check the column(s) you want to add and click on “Apply” to add those columns to view.



Re-Order Columns

- To reorder a column, drag it to the position you want.



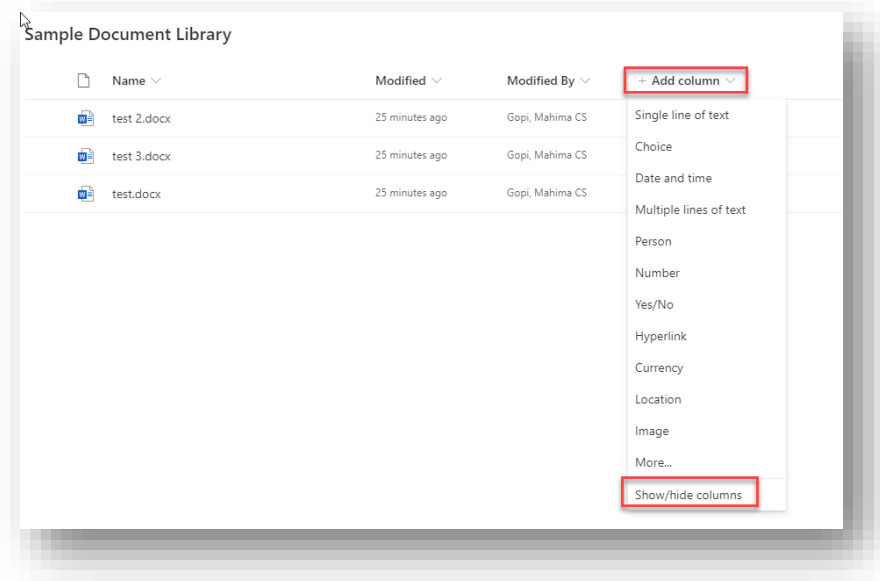
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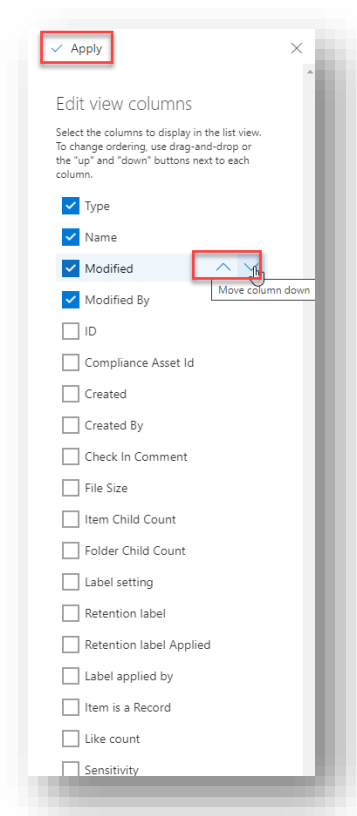
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- To reorder multiple columns at once in the view, click on “Add Columns” >> “Show/hide columns”.



- Click on the up and down arrows to change order and click “Apply”.



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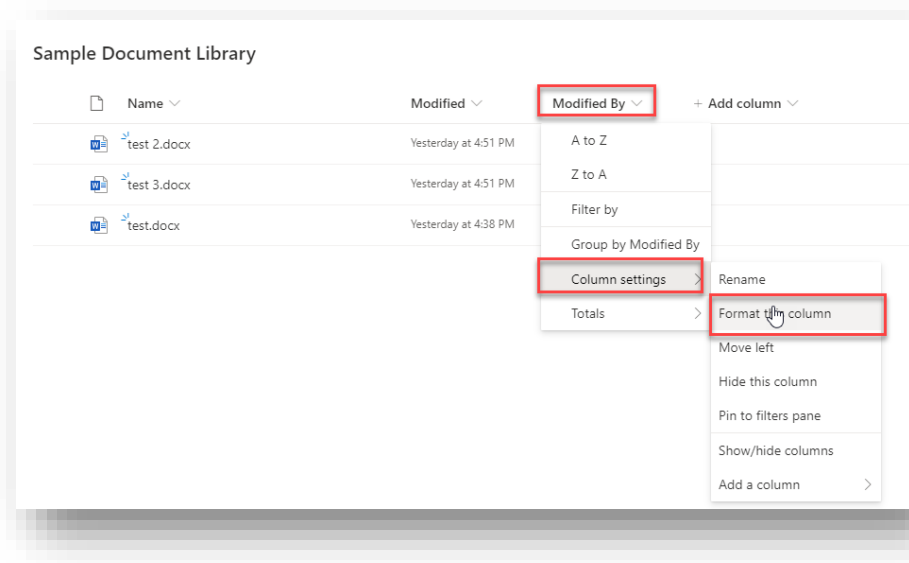
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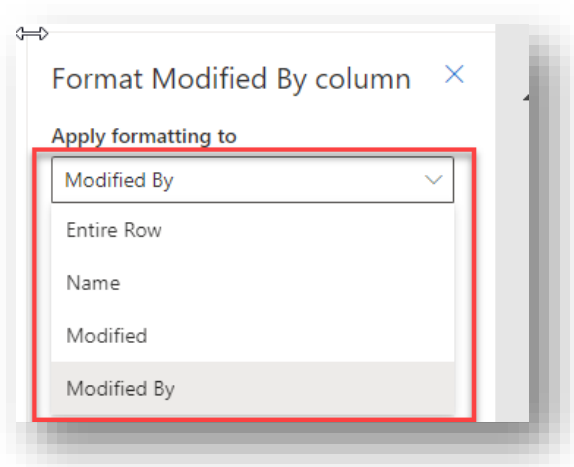
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Format Column

- To format a column, click on column name and select “Column Settings” >> “Format this column”.



- Select where you want to apply formatting.



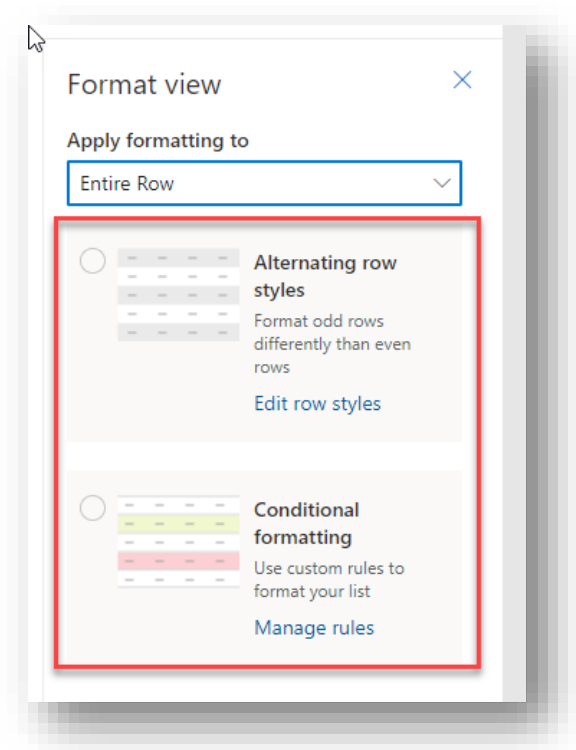
- Choose the formatting option.
Note: Alternating row styles is only available for entire row.

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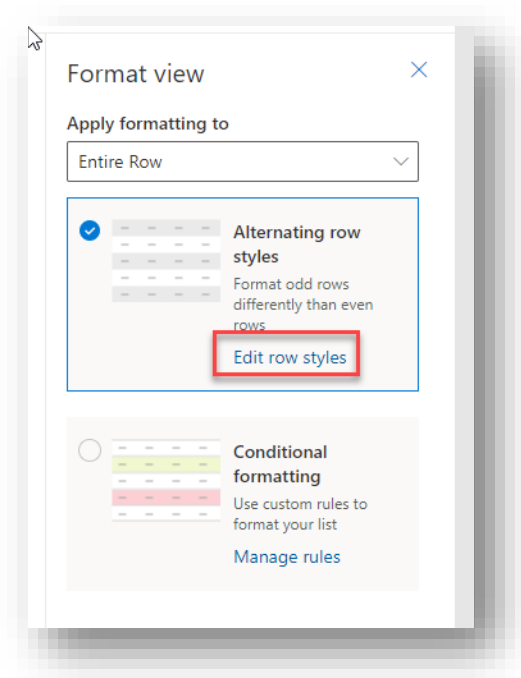
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Alternating row styles (For entire row)

- Formats odd rows differently than even rows.
- Click on “Edit row styles” to change the auto selected colors.



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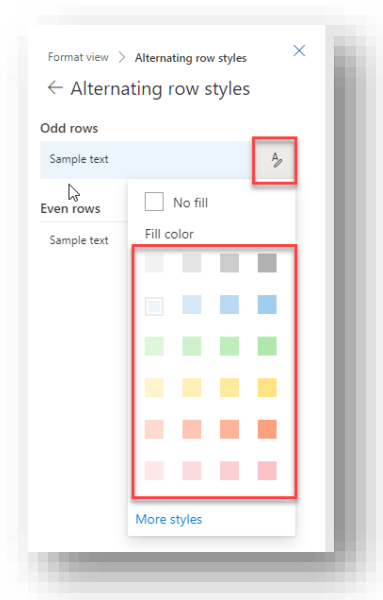
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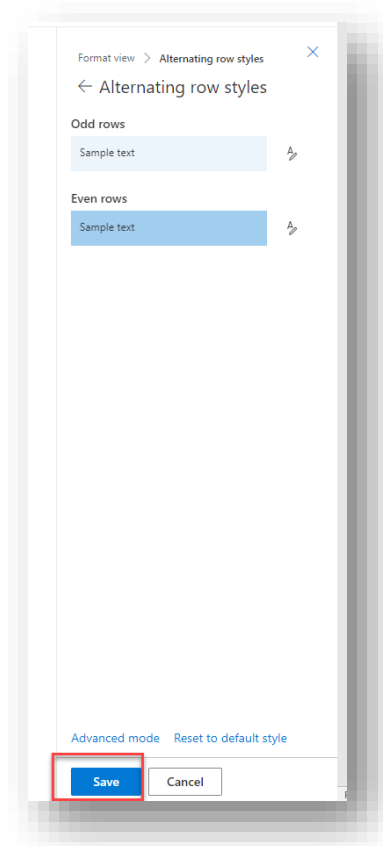
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- Click on “Save” to save the chosen formatting.



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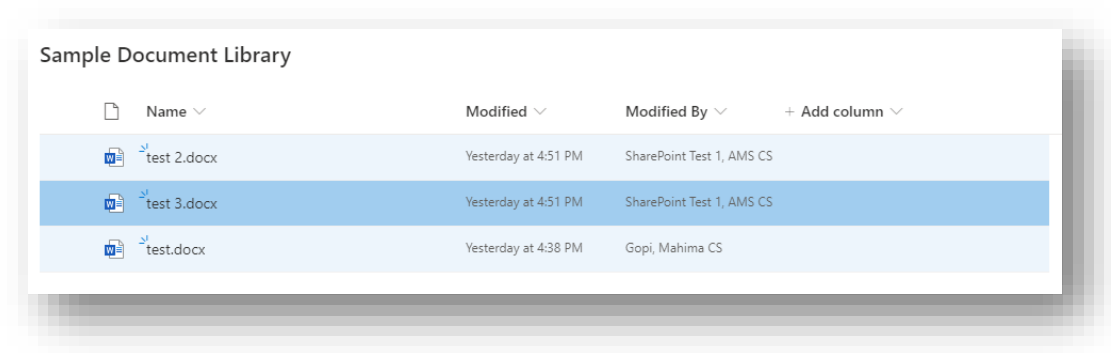
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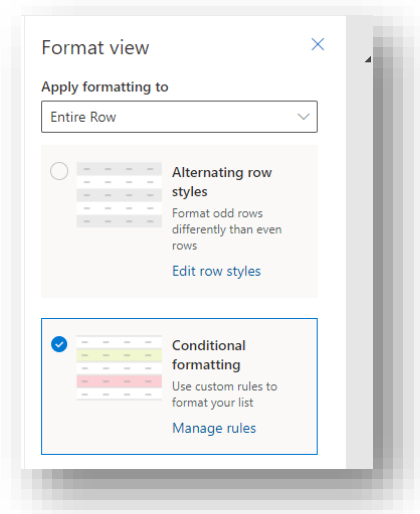
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Conditional Formatting

- Formatting based on a condition.



- Click on "Manage rules" to select condition.

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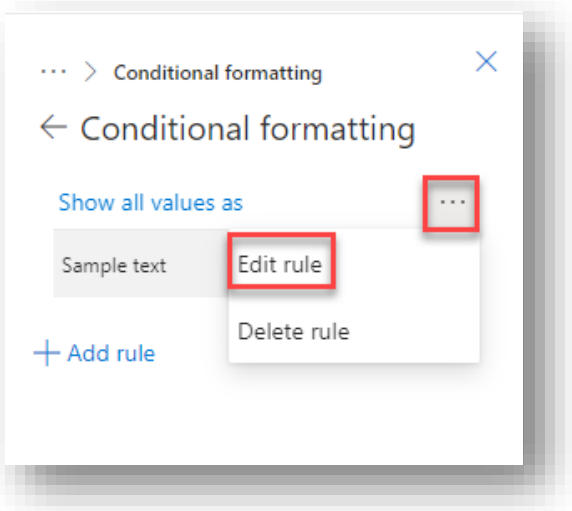
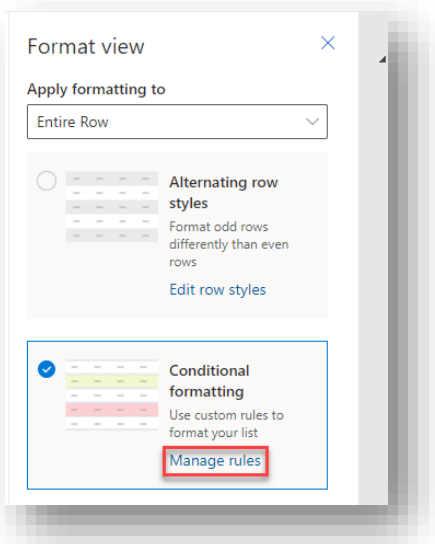
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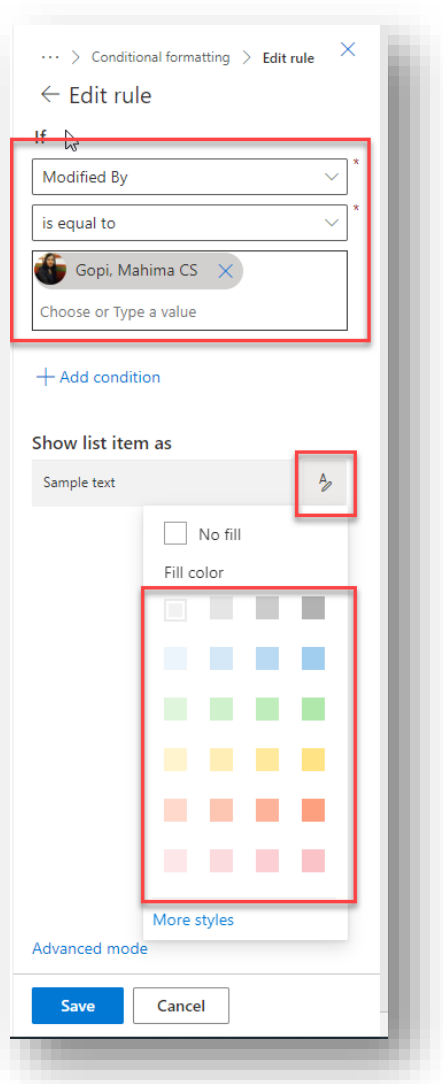


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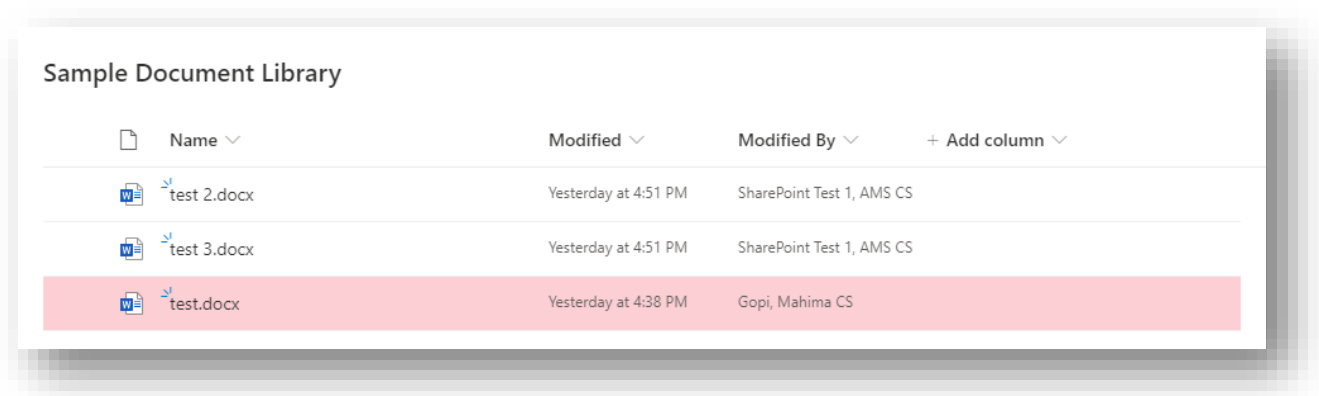
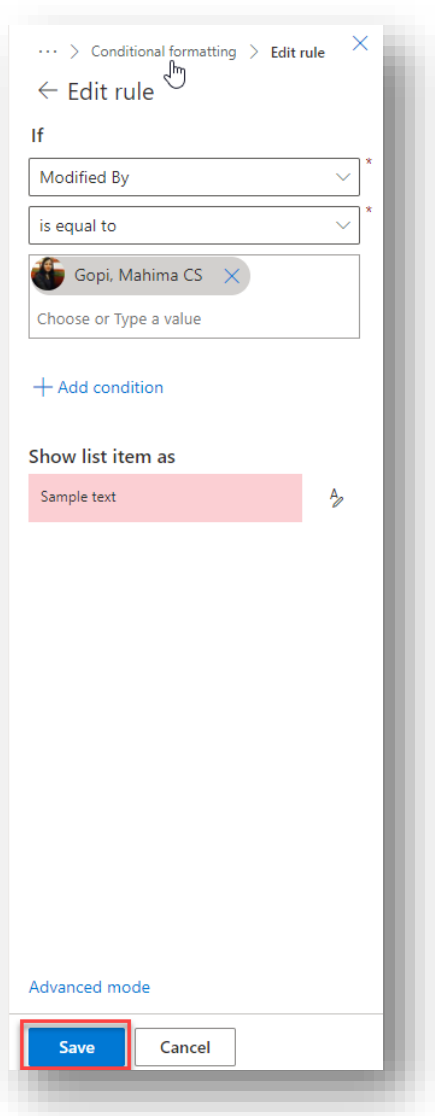
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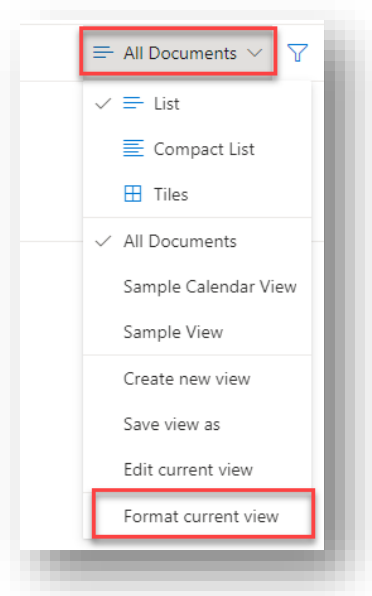
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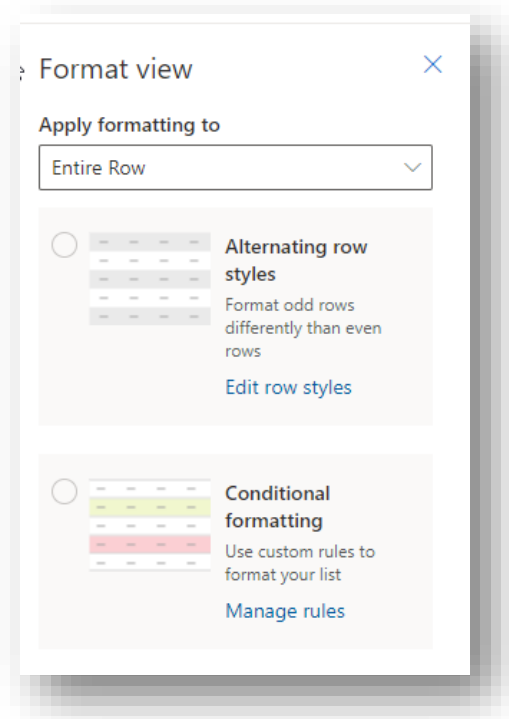
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Format View

- Click on “Format current view”.



- Choose the formatting option. Formatting options are explained in detail in the above [section 2.2.9.4](#).



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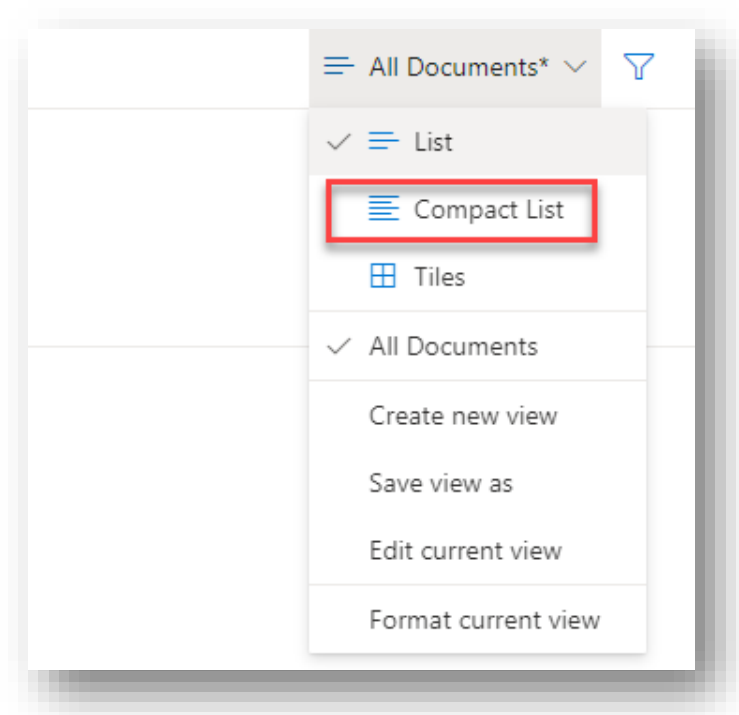
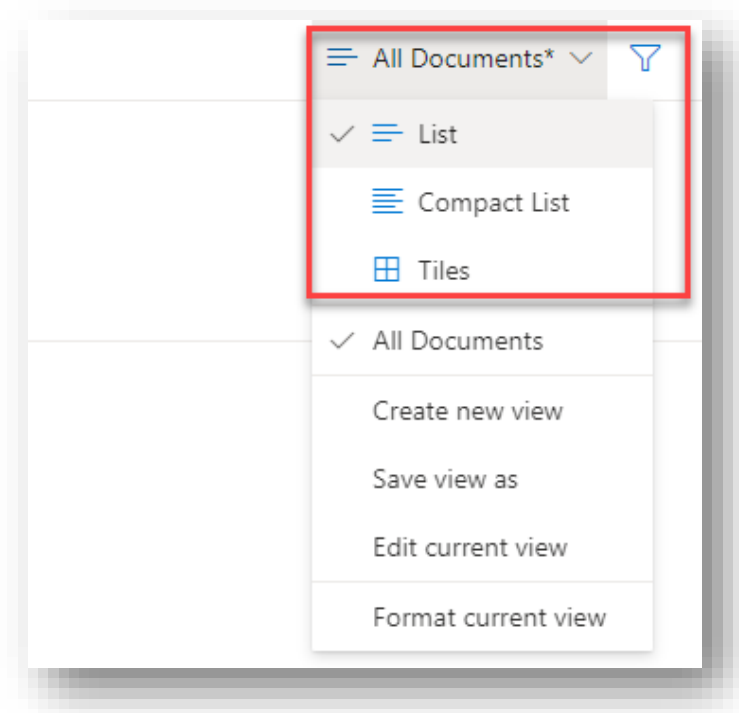
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Change View Style

- “List” is the default style selected. It can be changed to “Compact List” or “Tiles”.



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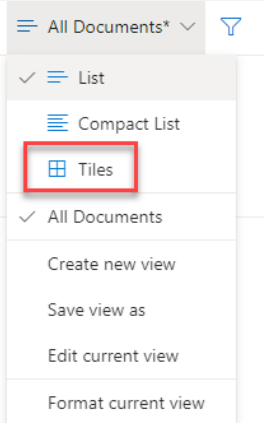
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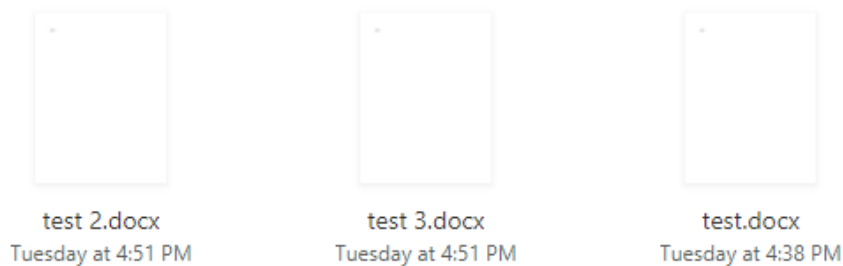
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Sample Document Library

Name	Modified	Modified By
test 2.docx	Tuesday at 4:51 PM	SharePoint Test 1, AMS CS
test 3.docx	Tuesday at 4:51 PM	SharePoint Test 1, AMS CS
test.docx	Tuesday at 4:38 PM	Gopi, Mahima CS



Sample Document Library



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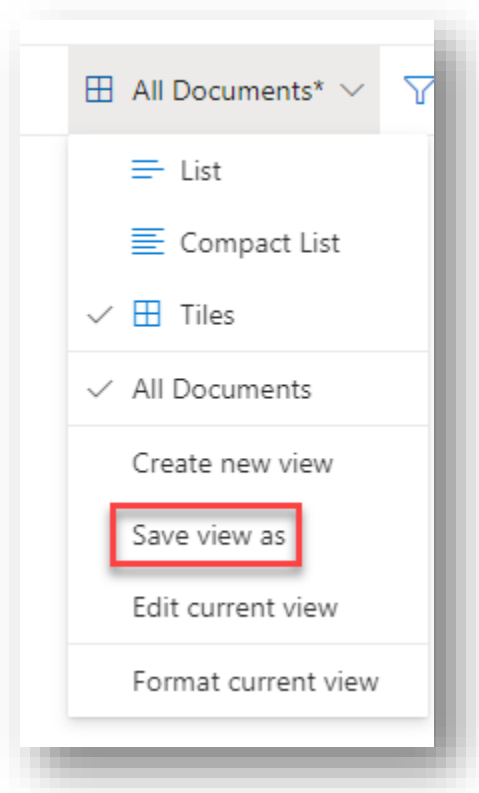
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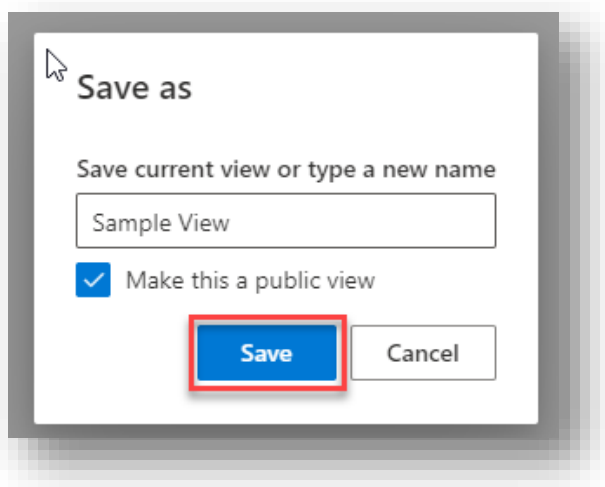
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Creating a new view

- Click on “Save view as” to save your current view as a new view.



- Enter the name of the view and click on “Save”.
Note: For creating a private view, uncheck “Make this a public view”.



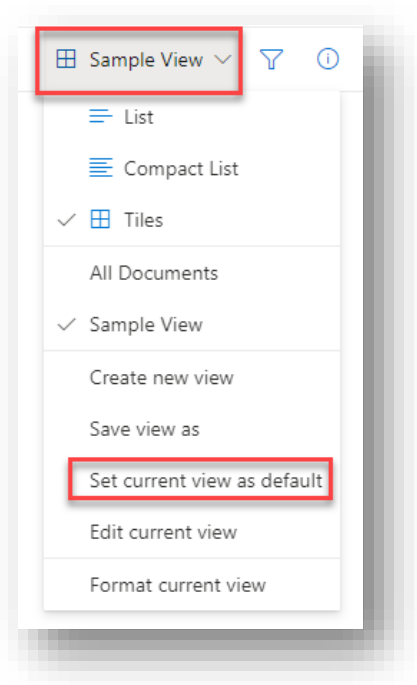
- For saving the view as default, click on “Set current view as default”.

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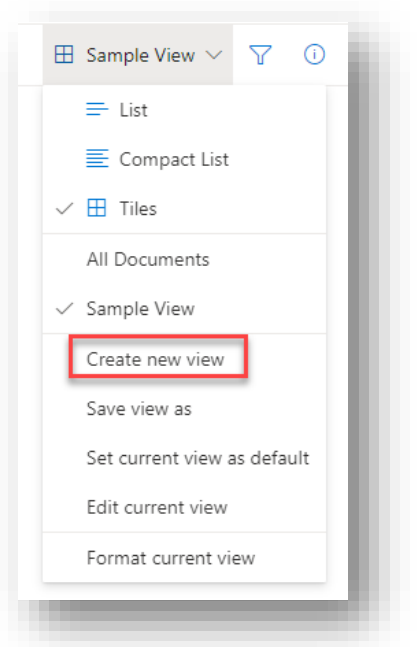
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- For creating a calendar view, click on “Create new view”.



- Select “Calendar” under “Show as”, select columns for “Start Date” and “End Date” and select a column to appear in title for the calendar. Click on “Create”.

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View name
Sample Calendar View

Show as
List Calendar

Start date on calendar
Created

End date on calendar
Created

Visibility ⓘ
 Make this a public view
Less options ^

Title of items on calendar
Title

Create Cancel

Sample Document Library

Today ↑ ↓ December 2020

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Nov 29	30	Dec 1	2	3	4	5
6	7	8 4:38p (no title) 4:51p (no title) 4:51p (no title)	9	Dec 10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	Jan 1	2

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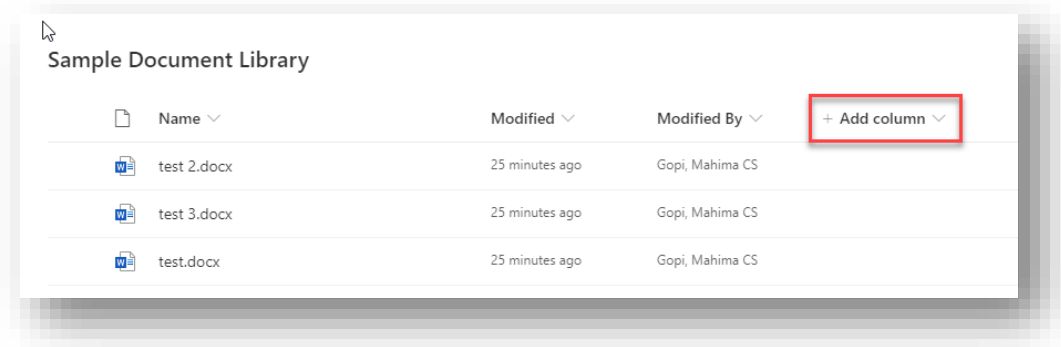
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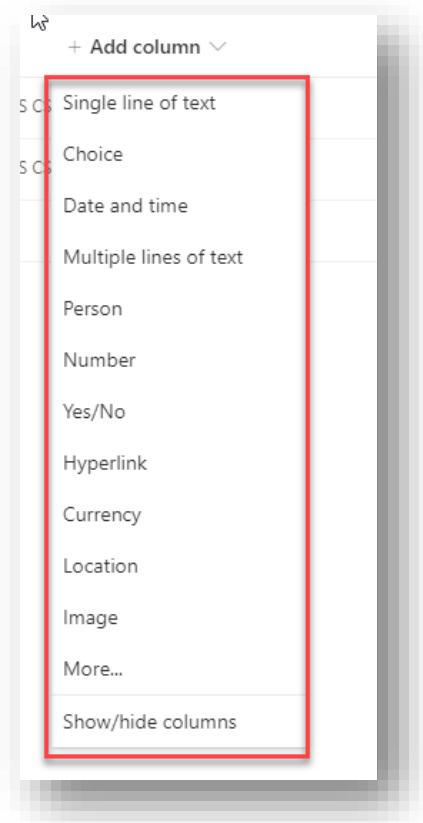
Columns or Properties

Add a new column

- Click on “Add column”.



- Select the type of column you want to add.



- Fill in the details and click “Save”.

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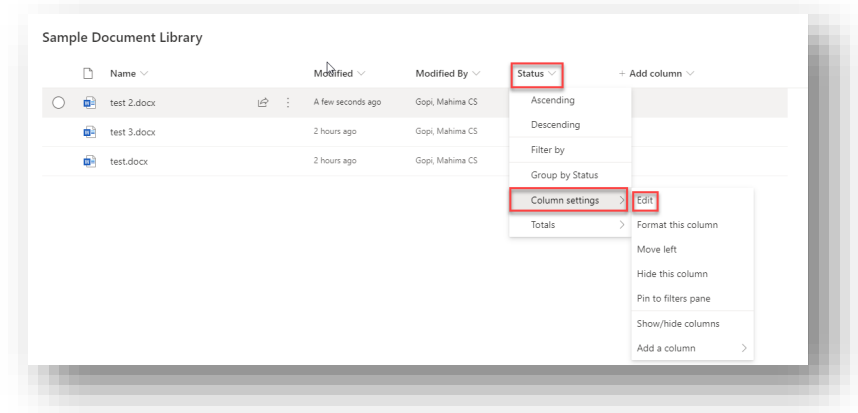
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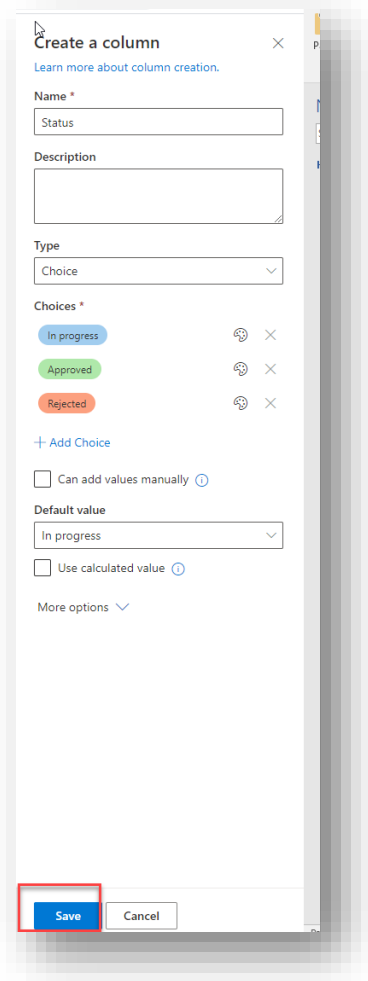
This document provides instructions and support for utilizing the many features available in SharePoint Document Libraries.

Edit a column

- To edit a column, click on column name and select “Column Settings” >> “Edit”.



- Make changes and click “Save”.



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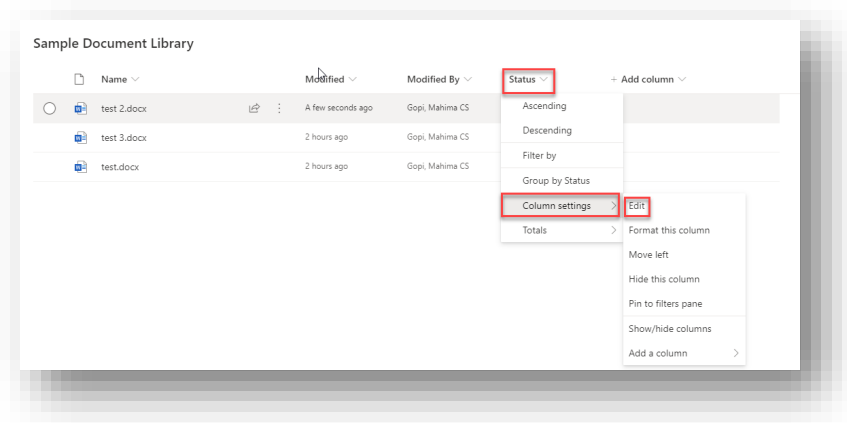
Last revised: February 2021
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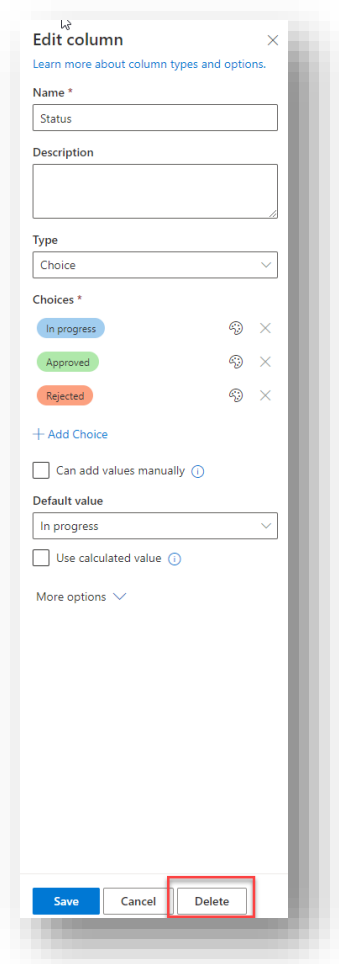
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Delete a column

- To delete a column, click on column name and select “Column Settings” >> “Edit”.



- Click on “Delete”.



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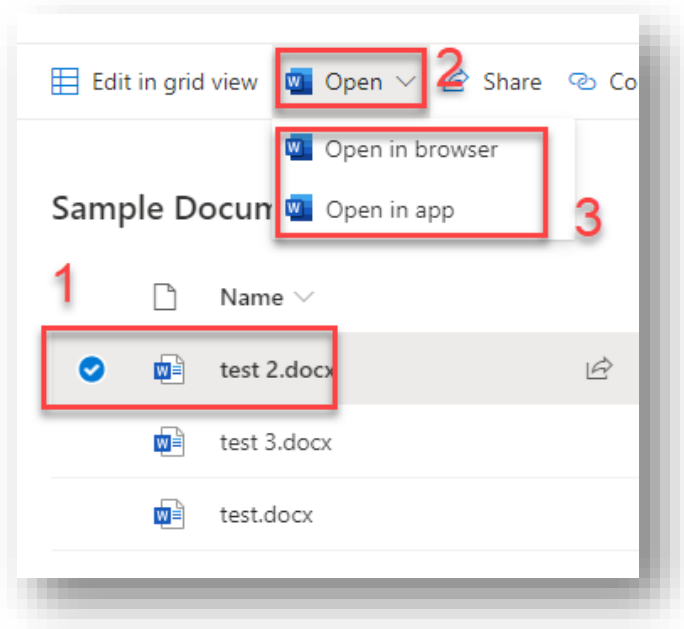
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Managing Files

Edit an existing file

- Select document, click “Open”. If you wish to edit the document in your desktop app, click “Open in app”. For editing document in browser app, click “Cancel”.

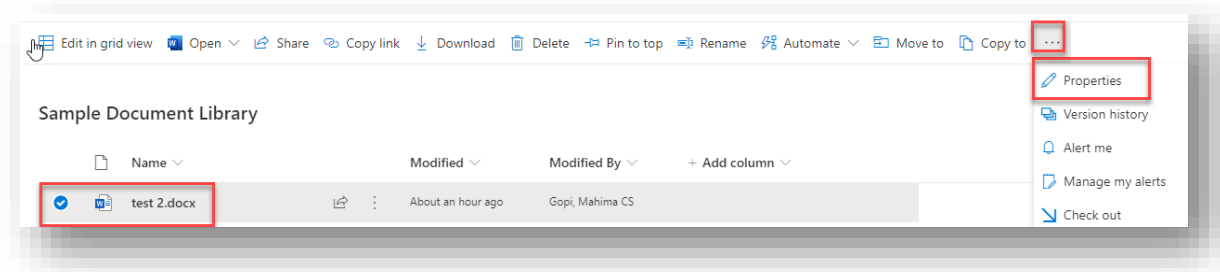


- Make changes and save the document.
Note: Additional step of checking out and checking in may be required for libraries which require documents to be checked out before editing.

Edit document properties

Single Document

- To edit the properties associated with a single document, select document >> “...” >> “Properties”.



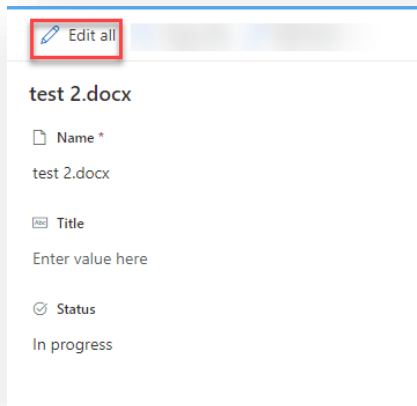
- Click on “Edit all”.

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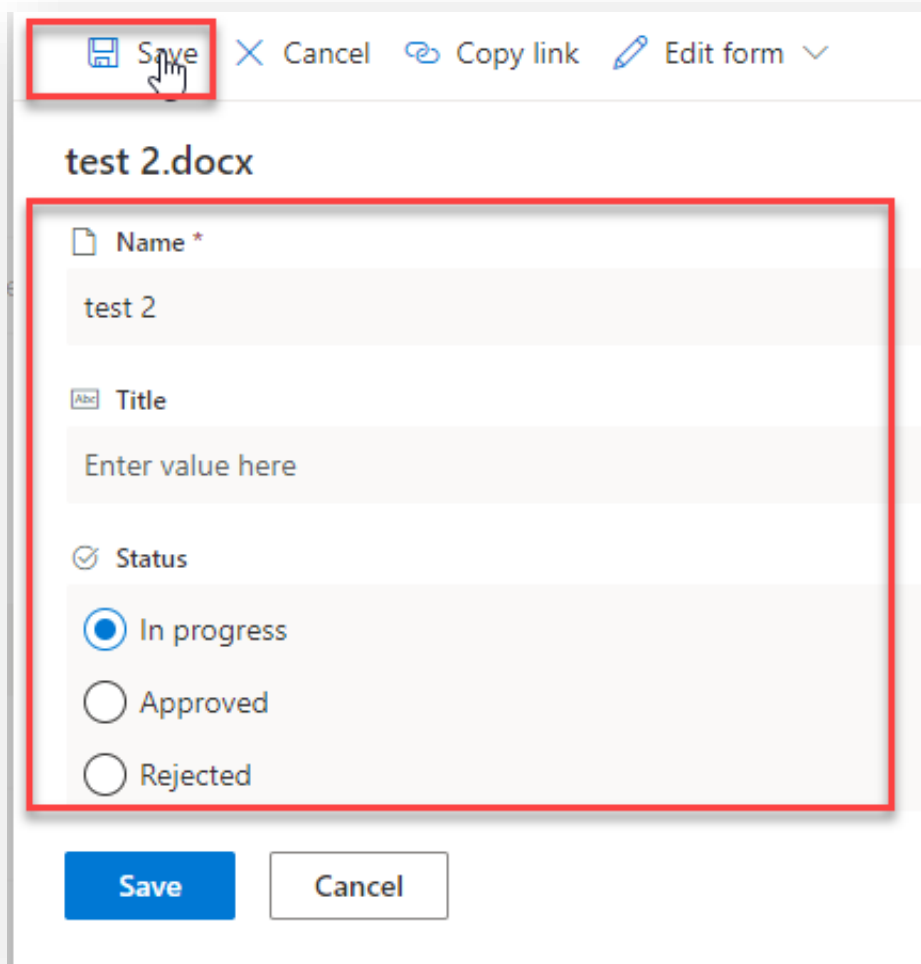
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A screenshot of a SharePoint document library interface. At the top, there is a button labeled "Edit all" with a pencil icon, which is highlighted with a red rectangular box. Below this button, the document title "test 2.docx" is displayed. Underneath the title, there are three form fields: "Name *" with the value "test 2.docx", "Title" with the placeholder text "Enter value here", and "Status" with the value "In progress".

- Make changes and click "Save".



A screenshot of a SharePoint document library interface showing the "Save" button highlighted with a red rectangular box. The button is labeled "Save" and has a floppy disk icon. To the right of the "Save" button are other options: "Cancel", "Copy link", and "Edit form". Below the button, the document title "test 2.docx" is displayed. Underneath the title, there are three form fields: "Name *" with the value "test 2", "Title" with the placeholder text "Enter value here", and "Status" with three radio button options: "In progress" (selected), "Approved", and "Rejected". At the bottom of the form, there are two buttons: "Save" (blue) and "Cancel" (white).

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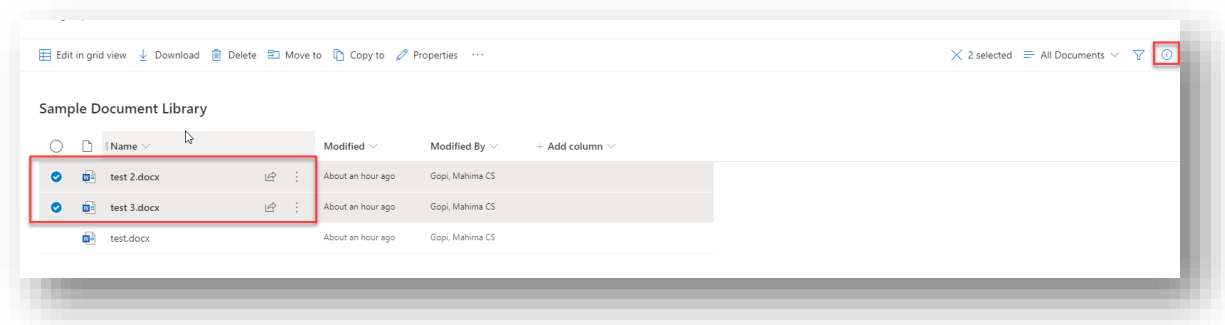
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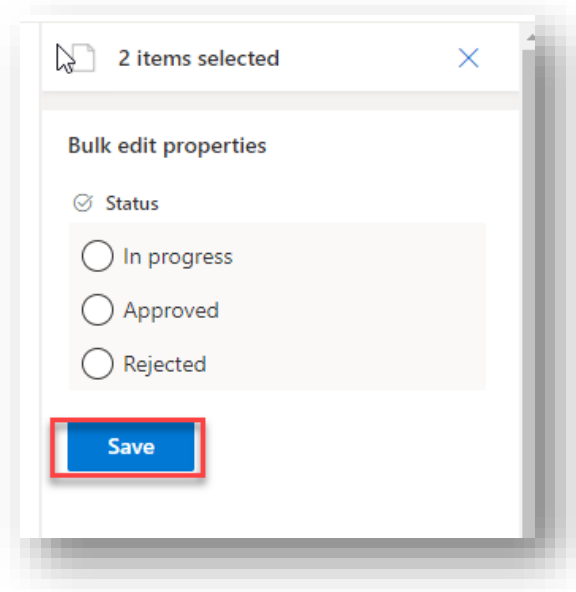
This document provides instructions and support for utilizing the many features available in SharePoint Document Libraries.

Bulk Edit

- To edit properties associated with multiple documents with same value, select documents and click on  or click “Properties” on the top.



- Make changes and click on “Save”.



Edit in grid view

- Click “Edit in grid view”.

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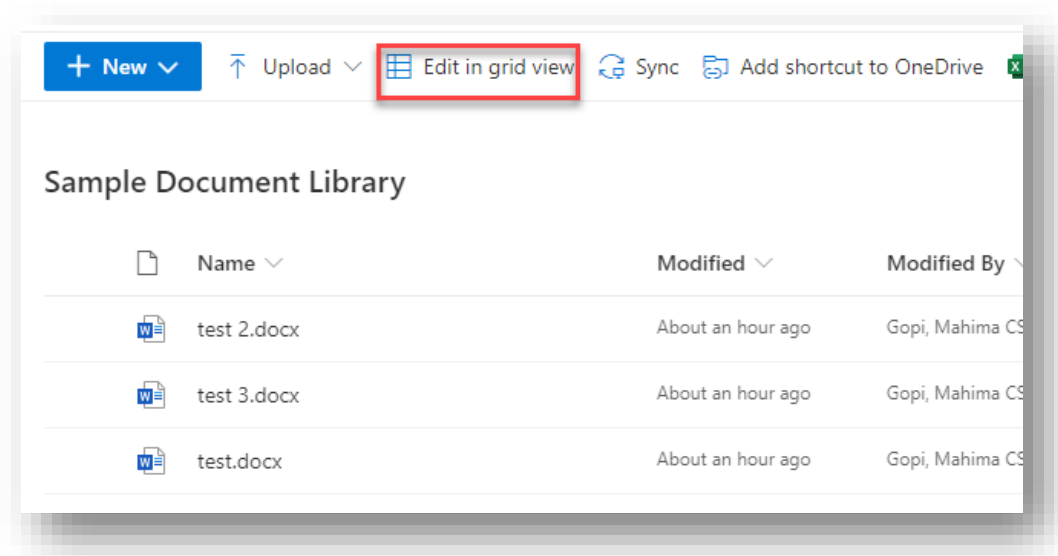
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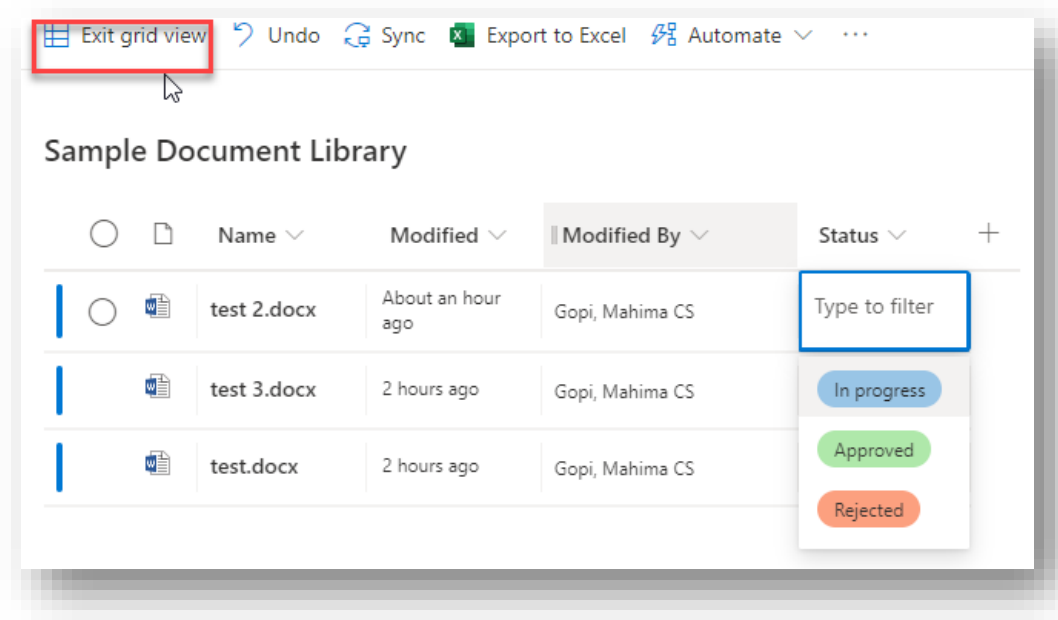
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- Make changes and click “Exit grid view”.



Delete file(s)

- Select file(s) and click “Delete”.

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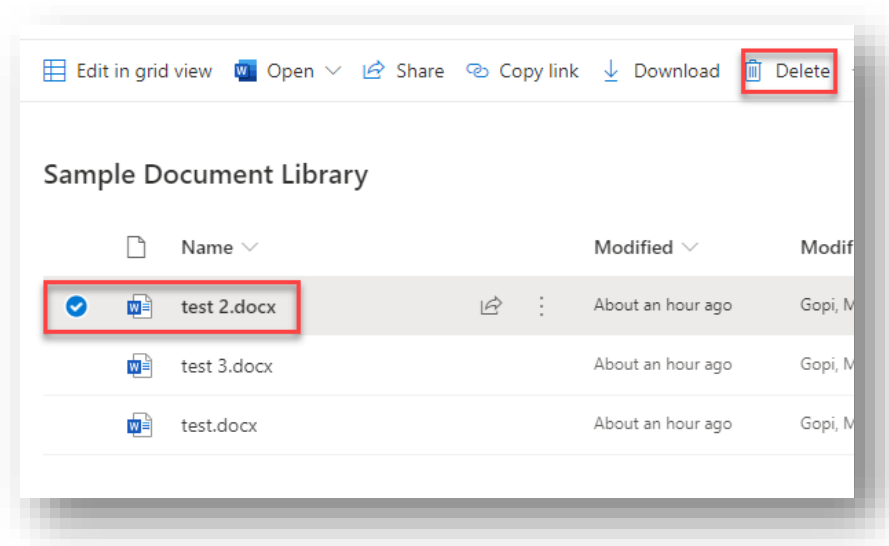
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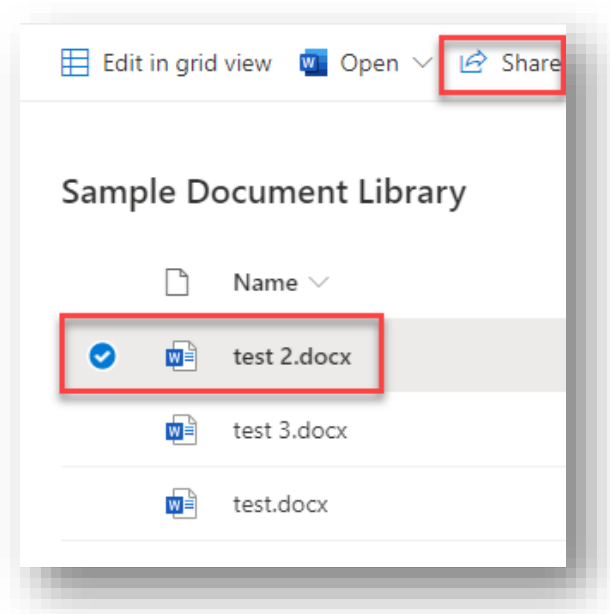
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Share file

- Select file and click “Share”.



- Type in the name on the person.

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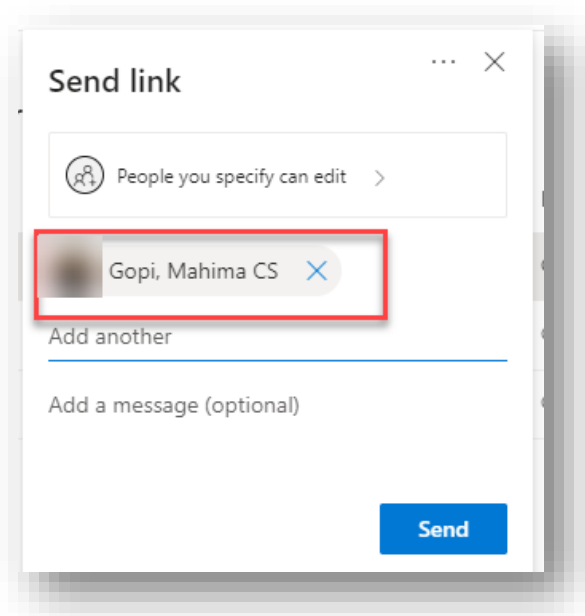
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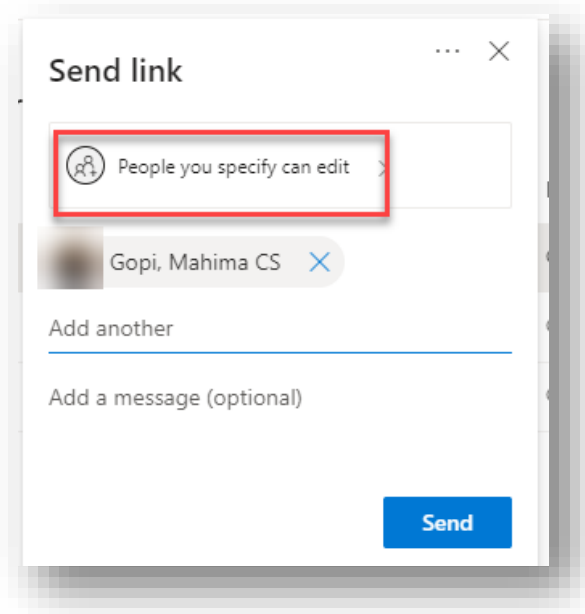
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- Click on “People you specify can edit” if you want to change sharing details.



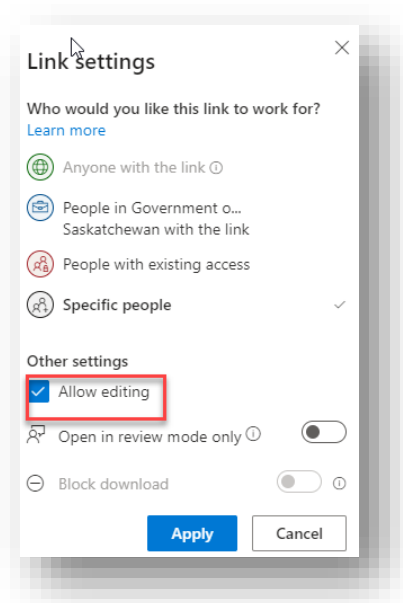
- Uncheck “Allow editing”, if you don’t want to give edit access.

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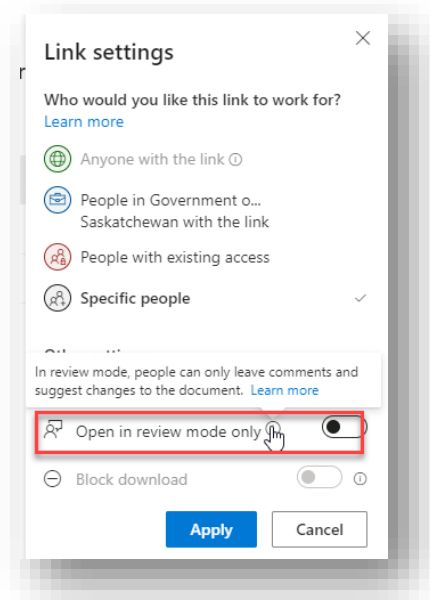
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- Enable review mode if you want people to only leave comments and suggest changes to the document.



- Click "Apply".

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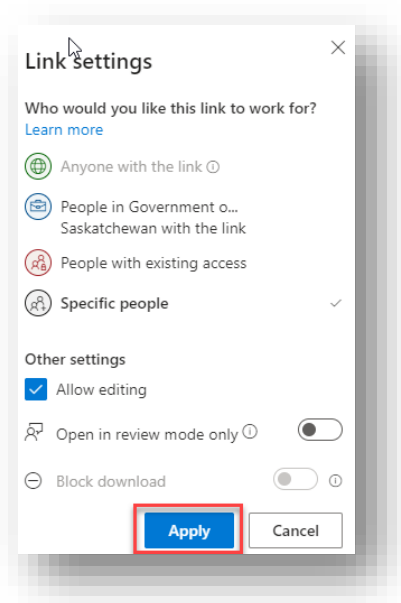
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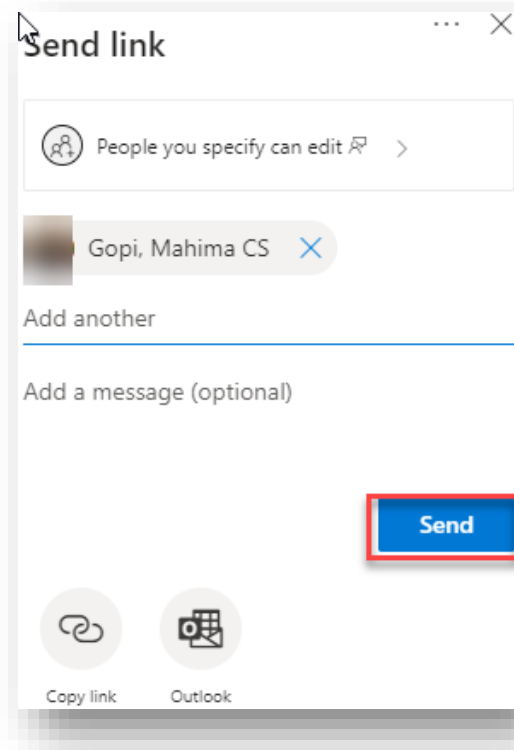
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- Click "Send".



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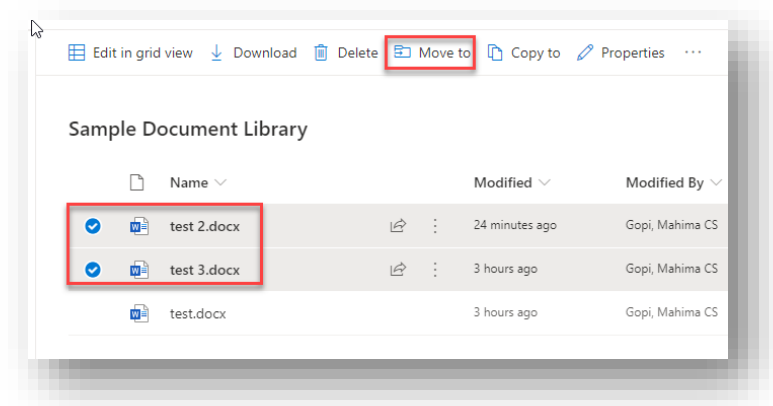
Last revised: February 2021

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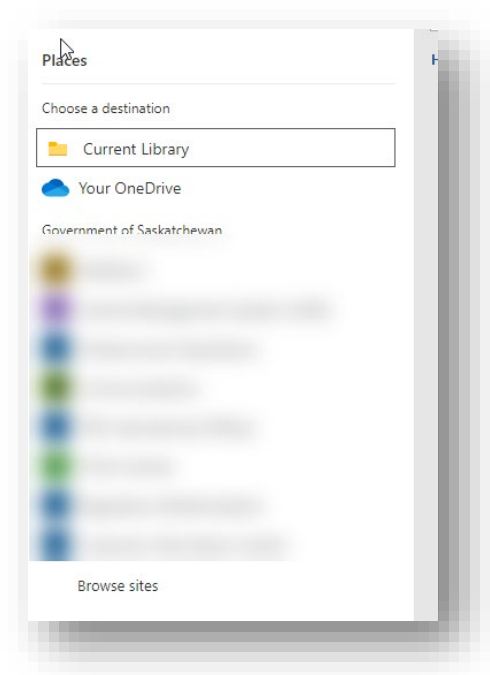
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Move files or folders to another location

- Select file(s) and click “Move”.



- Select destination location.



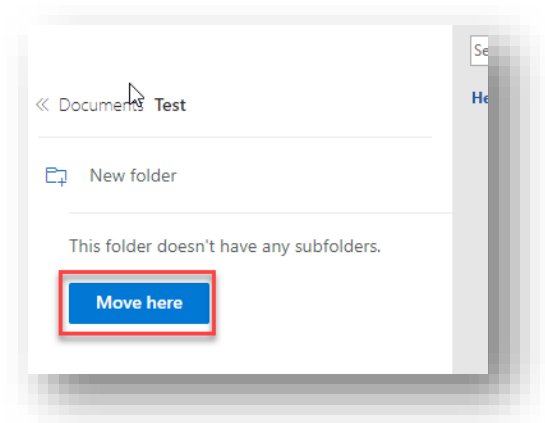
- Click “Move here”.

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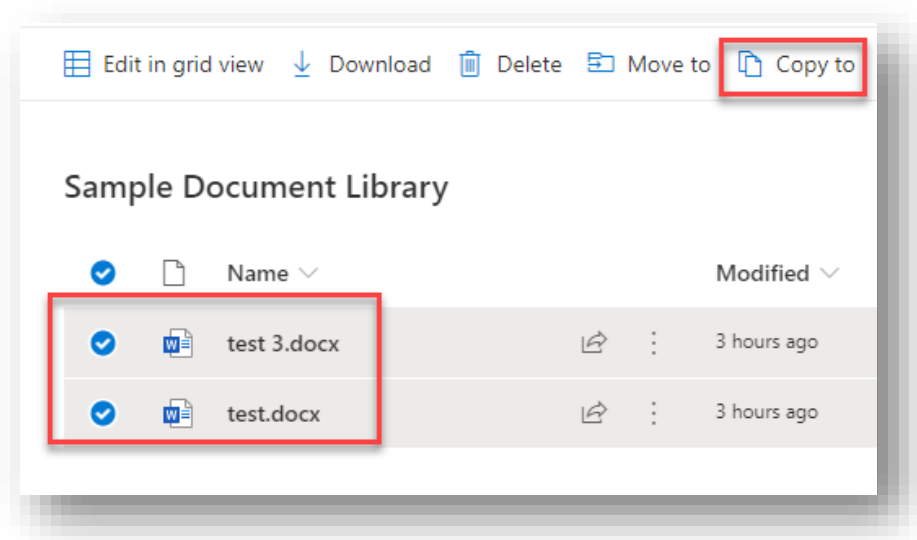
- Files will be moved from source to destination.

A screenshot of a SharePoint document library table titled 'Sample Document Library'. The table has columns for Name, Modified, Modified By, and Status. Two files are listed: 'test 3.docx' with status 'Approved' and 'test.docx' with status 'Rejected'.

Name	Modified	Modified By	Status
test 3.docx	3 hours ago	Gopi, Mahima CS	Approved
test.docx	3 hours ago	Gopi, Mahima CS	Rejected

Copy files or folders to another location

- Select file(s) and click "Copy to".



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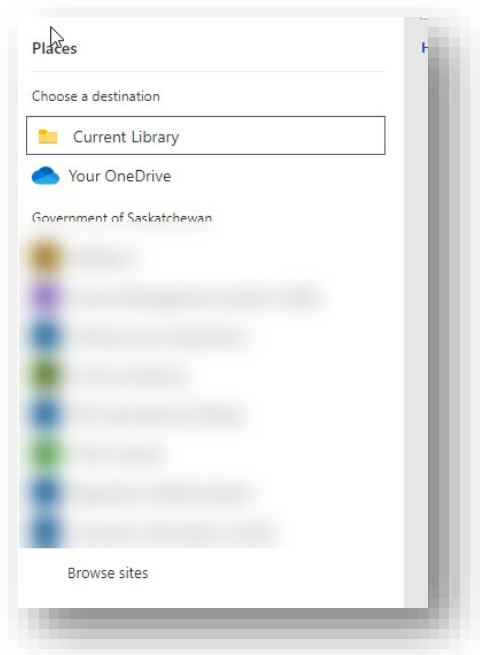
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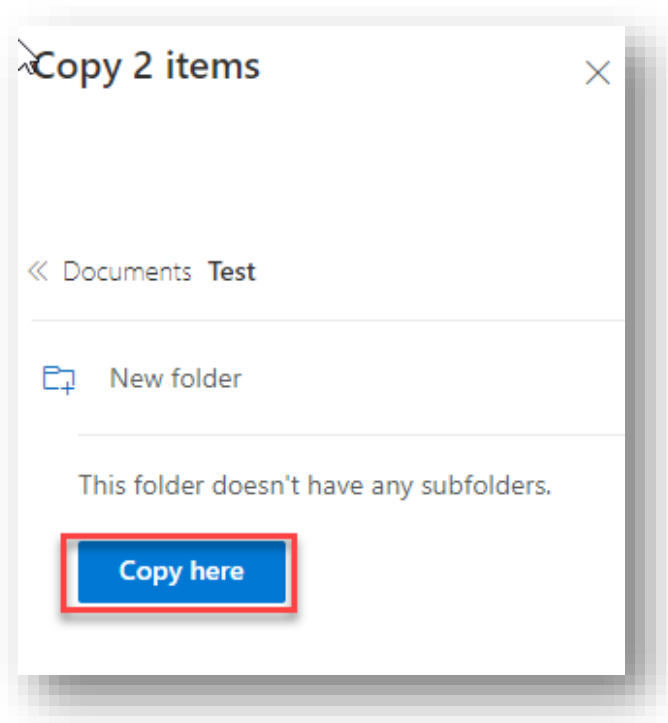
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- Select location.



- Click "Copy here".



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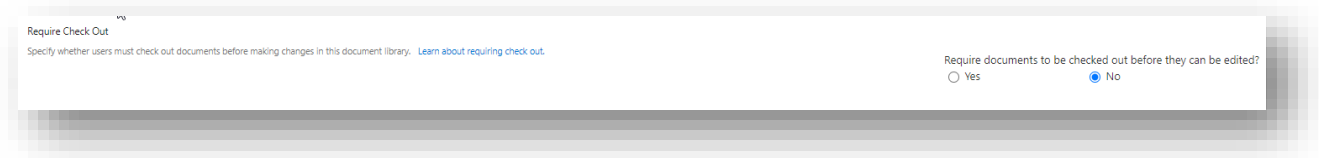
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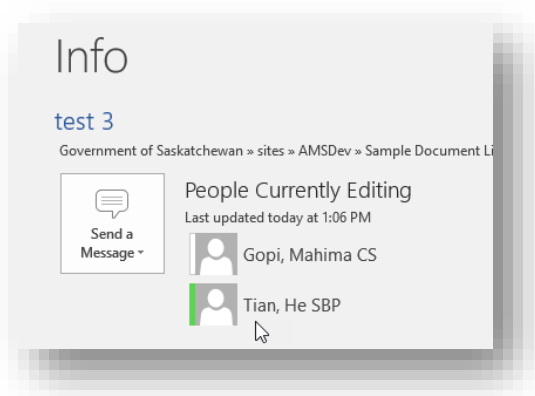
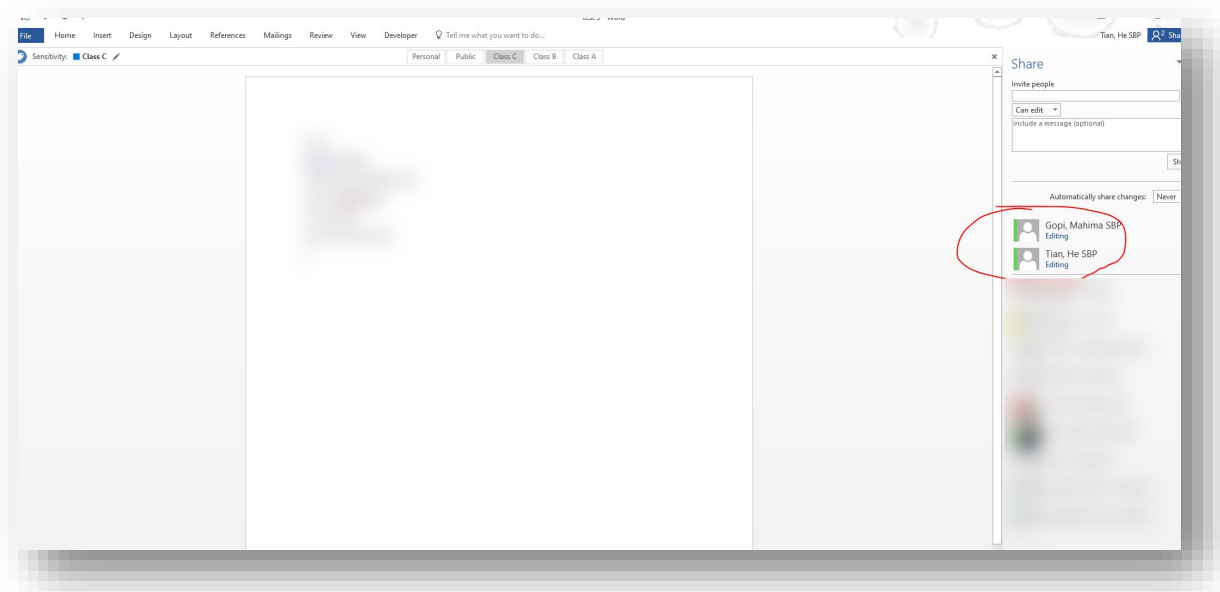
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Enable co-authoring

- Co-authoring is enabled by default in libraries. Multiple users can edit documents at the same time. The setting “Require documents to be checked out before they can be edited?” should be set to “No” for this feature to work.



- The number of users currently editing the document appears at the top right of the document.



Request sign-off on a document

- Select the document you want approval on, click “Automate” >> “Request sign-off”.

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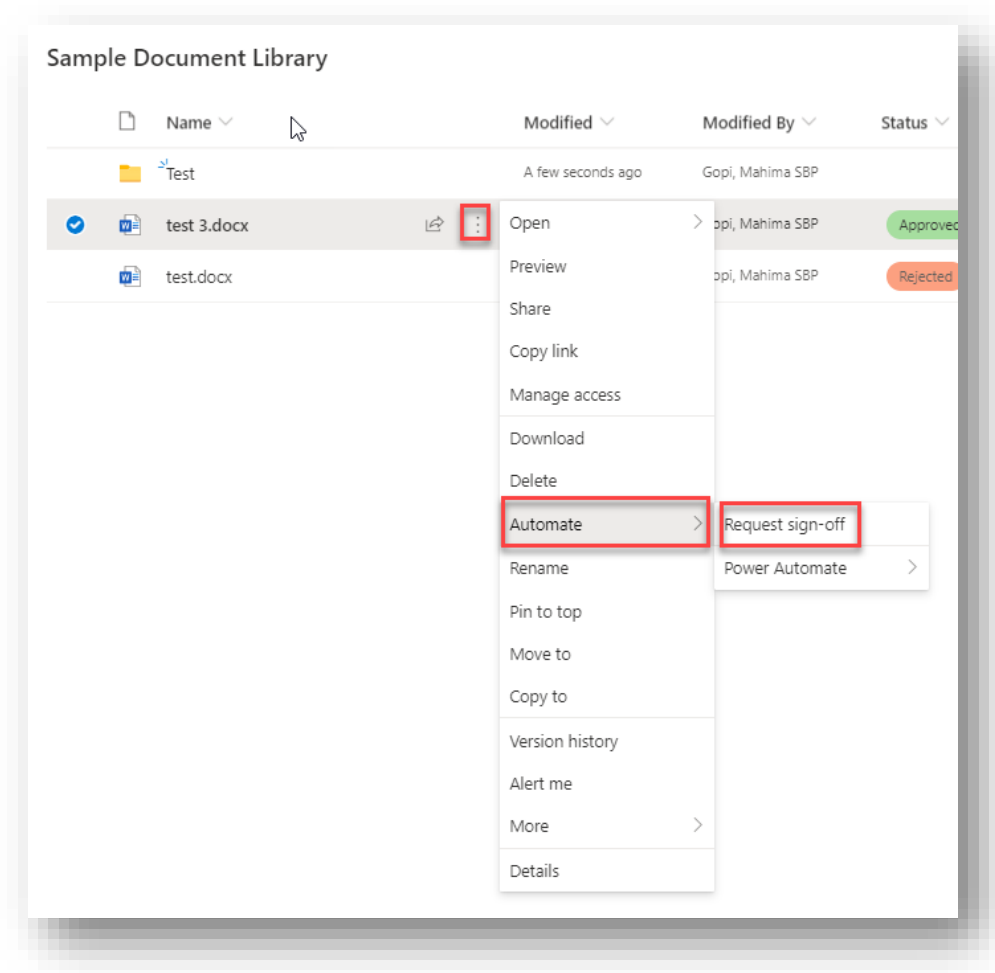
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- Click on "Create flow".

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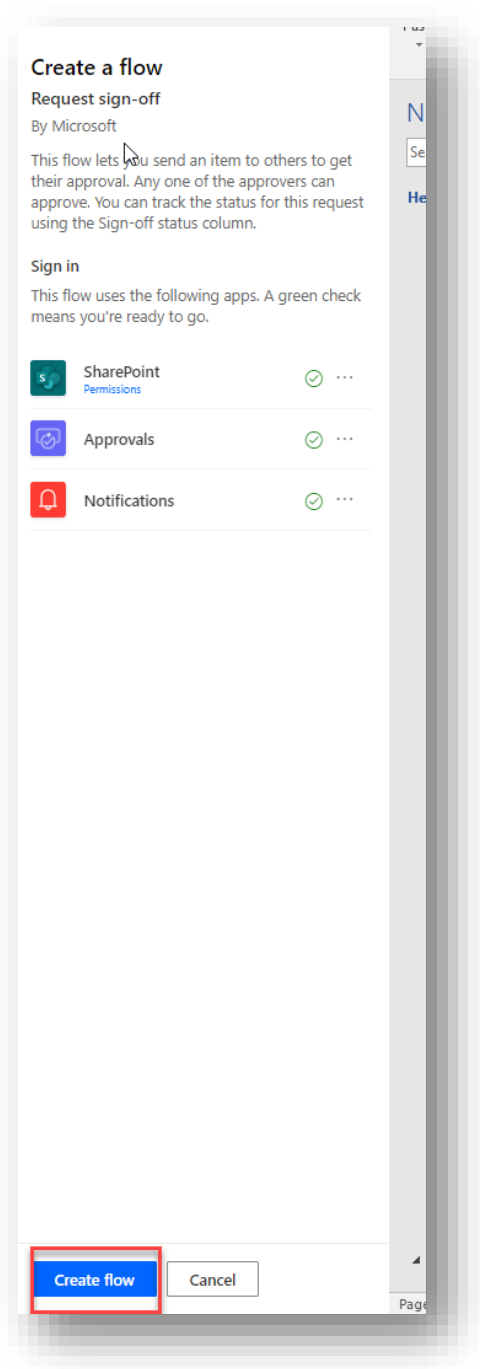
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- Select “Approver”, “Message for approver” and click on “Run flow”.

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The screenshot shows a 'Run flow' dialog box with the following elements:

- Run flow** (Section Header)
- Request sign-off** (Section Header)
- Description: "This flow lets you send an item to others to get their approval. Any one of the approvers can approve. You can track the status for this request using the Sign-off status column."
- Approver *** (Label): A text input field containing "Gopi, Mahima SBP" with a red rectangular highlight around the text.
- Message *** (Label): A text input field containing "Please approve this" with a red rectangular highlight around the text.
- Footer: "This flow uses SharePoint, Approvals, and Notifications." followed by a blue link: [Review connections and actions](#).
- Buttons: A blue "Run flow" button and a white "Cancel" button, both with red rectangular highlights.

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- Sign-off status will appear as “Pending”.

Sample Document Library

Name	Modified	Modified By	Status	Sign-off status
Test	17 minutes ago	Gopi, Mahima SBP		
test 3.docx	4 days ago	Gopi, Mahima SBP	Approved	Pending
test.docx	4 days ago	Gopi, Mahima SBP	Rejected	

- Approver will get an email to approve or reject the document.



- Approver can click on “Approve” or “Reject” in the email and click on “Confirm” on the next screen.

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Respond: Approve ✕

Overview

Approval
Please approve 'test 3'

Requester
 Gopi, Mahima SBP

Received
Dec 14, 05:11 PM (2 min ago)

Link
[test 3](#)

Details

Please approve this

Approve ▾

Add a comment (optional)

Confirm

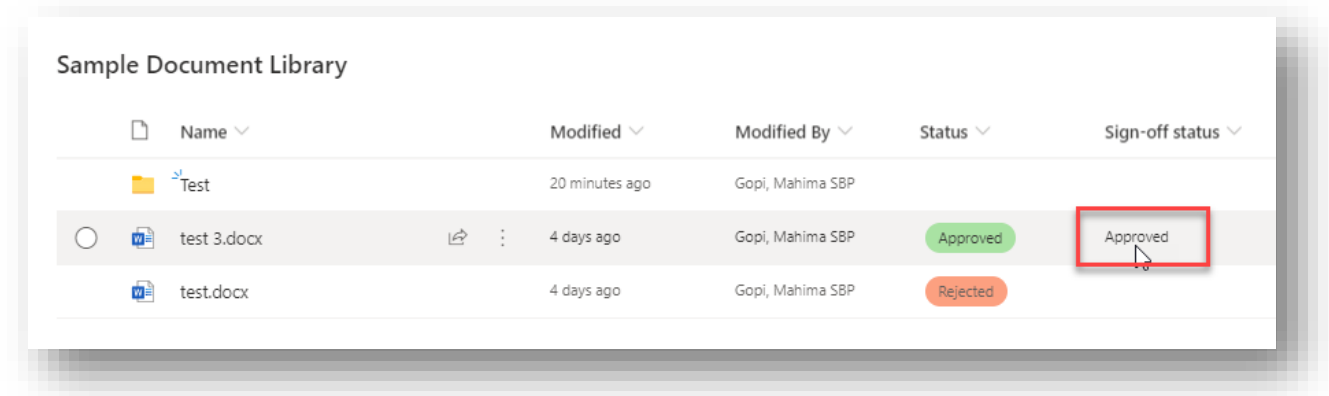
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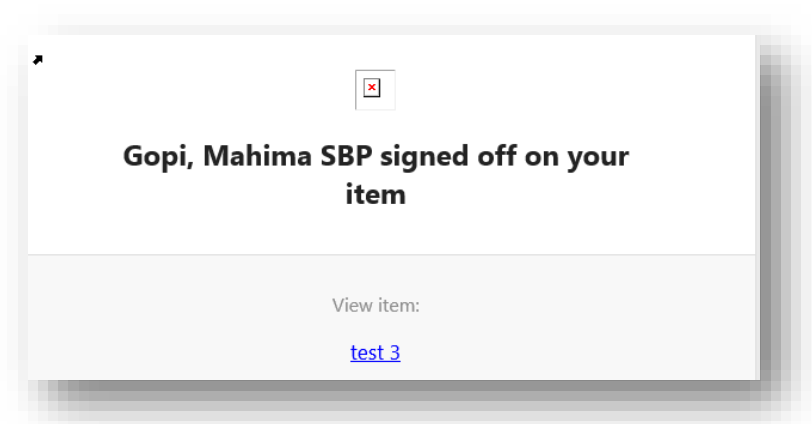
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- Sign-off status will change to “Approved” after the approver approves it.



- Requester will get an email notification about the approval status.



Alerts

Set alerts on a document library

- To set up alerts on a library, click on “...” >> “Alert me”.

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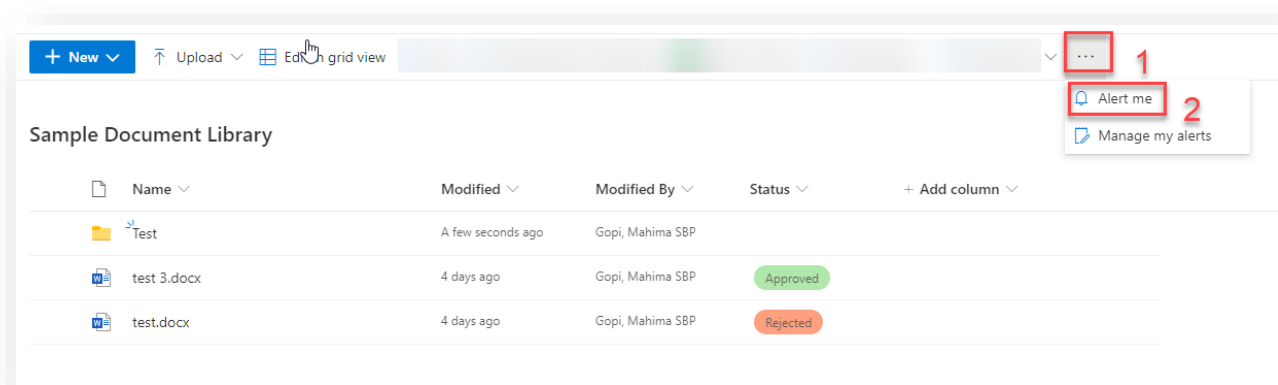
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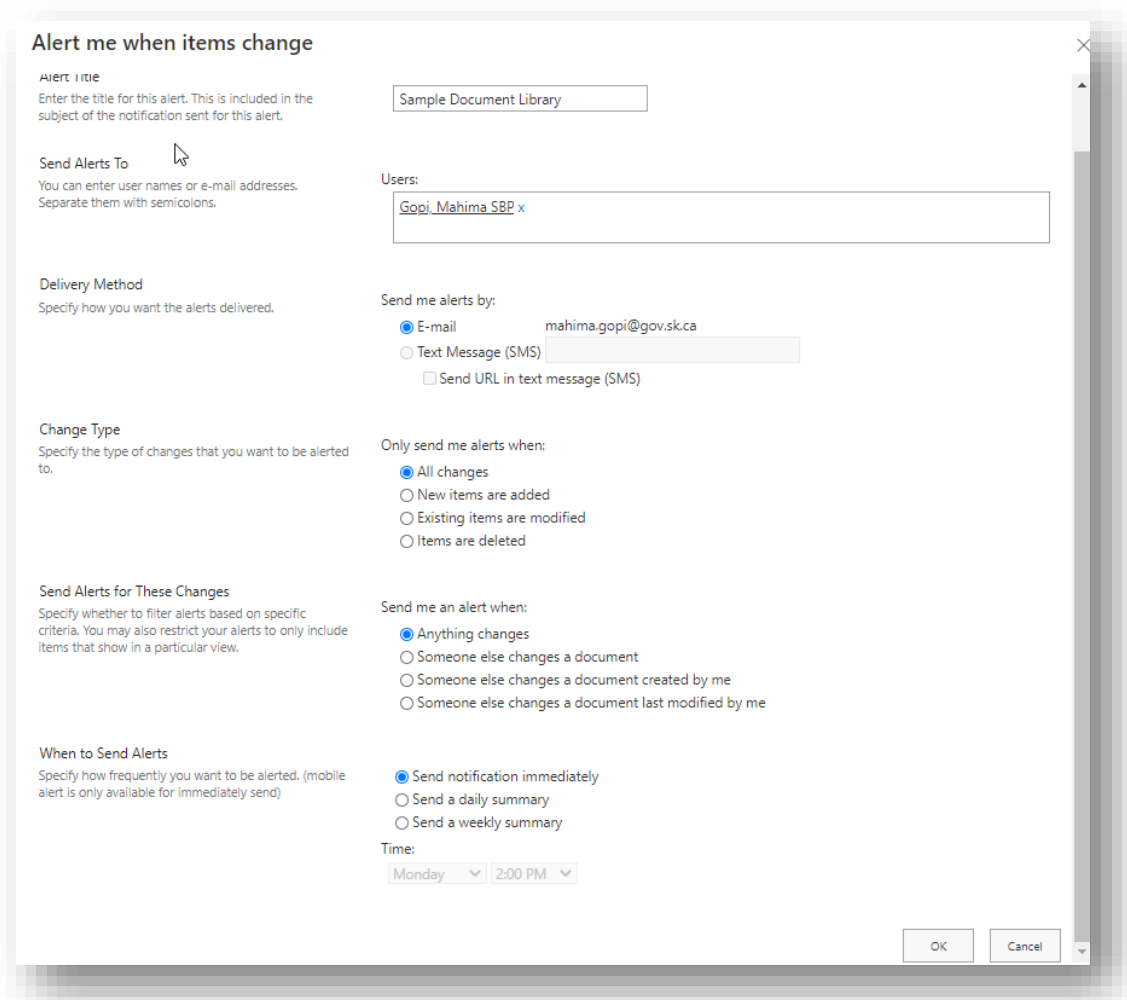
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- Fill in alert details and click "OK".



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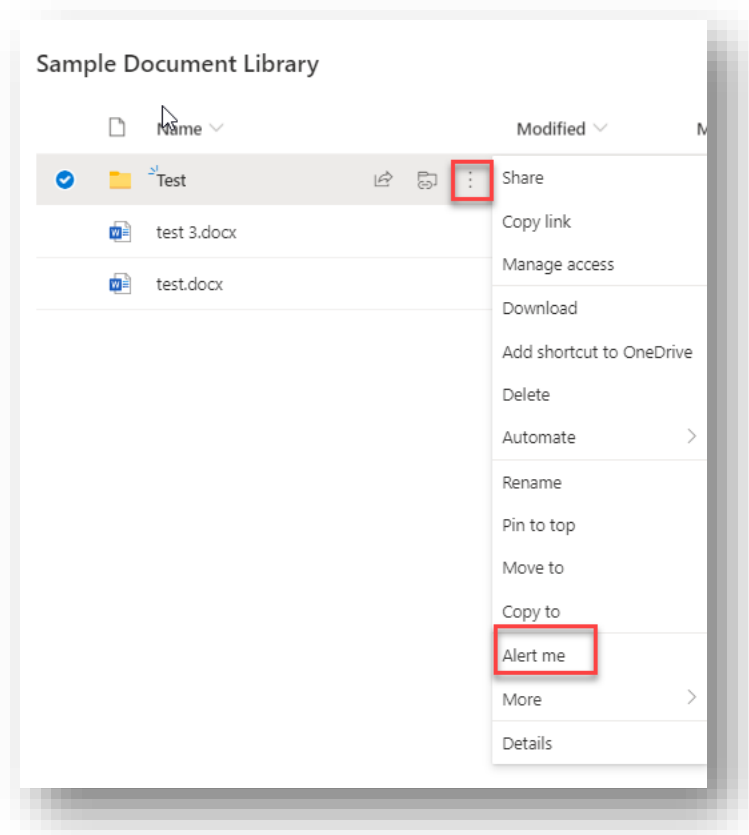
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Set alerts on a single folder or file

- To set up alerts on single file or folder, select the file or folder and select “Alert me” from the menu.



- Fill in alert details and click “OK”.

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Alert me when items change

Alert Title
Enter the title for this alert. This is included in the subject of the notification sent for this alert.

Send Alerts To
You can enter user names or e-mail addresses. Separate them with semicolons.

Delivery Method
Specify how you want the alerts delivered.

Change Type
Specify the type of changes that you want to be alerted to.

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

When to Send Alerts
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

Users:
Gopi_Mahima_SBP x

Send me alerts by:
 E-mail mahima.gopi@gov.sk.ca
 Text Message (SMS)
 Send URL in text message (SMS)

Only send me alerts when:
 All changes
 New items are added
 Existing items are modified
 Items are deleted

Send me an alert when:
 Anything changes
 Someone else changes a document
 Someone else changes a document created by me
 Someone else changes a document last modified by me

Send notification immediately
 Send notification immediately
 Send a daily summary
 Send a weekly summary

Time:
Monday 3:00 PM