ICT292 Information Systems Management

# Lab 04: SharePoint Libraries

In the last lab, you met SharePoint lists as a way of collecting, storing and viewing data. You met some of the pre-defined lists and explored some simple customization of the “out-of-the-box” lists and data entry validation. Libraries are similar to lists in some ways, but the main difference is that libraries contain documents. Libraries in SharePoint are useful to us in information management because we can determine what metadata is stored with each document. We can also use SharePoint libraries to manage document version control.

## Aims:

The primary aims of this lab are for you to be able to use libraries in SharePoint.

## To be prepared for this lab, you will need to:

* Be correctly enrolled in the unit, and
* Have a web-browser ☺
* Have access to: [ICT292 2024 TMA - Home (sharepoint.com)](https://murdochuniversity.sharepoint.com/sites/ICT2922024TMA)

## Introduction

In this lab, you will work through several exercises that explore how SharePoint libraries work. You will be using libraries as you begin work on your group project later in the semester.

### Task 1: Creating a Library and Adding Metadata Columns

In this first task, you will create a library in the site you created for yourself in the last lab.

* 1. Create a Library for Microsoft Word documents
* **Add an app** and select the **Document Library** template (Note: You may get a message stating that built in apps such as document library can be found in the classic experience. If you do, click classic experience as shown in the Figure below)

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* Select **Advanced Options** *(as shown in the Figure above)*
  + Name your library “MyDocs” **\*\*\*No spaces\*\*\***
  + Select “No” for Document Version history
  + Make sure that Microsoft Word document is selected from the Document Template dropdown

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* Click Create
* Click Create Column in the Library tab toolbar and add a column called Department with Single line of text as the type of information.

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* Click the Files tab and then Upload document
* Select a word document from your local storage and OK to upload the document
* Select Properties from the … next to the filename to view the properties:

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* Add some detail to the Title and Department fields:

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The capacity to store metadata with documents is an important aspect of document and information management. Just as we added metadata relevant to ‘Department’ we could equally have added many others as well.

### Task 2: Managing Documents and Versioning

Whenever you work collaboratively on documents you need to ensure you manage the various versions on which you are working. This allows you to work back through the history of a document if need be.

2.1 Checking Out Documents

* Go the MyDocs library
* Select the properties on your Demo Document and select Check Out

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* To check the document back in, select properties again and select Check In. You may also move your mouse pointer to the document as shown in the Figure below and select check in or discard check out. You can add comments describing what has changed.

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2.2 Document Versioning

Versioning of documents is a vital aspect of document management. This means, particularly in a collaborative environment, we can make changes to documents and be able to revert to previous versions if required. We can also set the document library to require a document to be checked out before it can be edited.

* Go to the MyDocs library and select Library Settings

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* Select Versioning settings from the General Settings list and check the following options:
  + Create major and minor (draft) versions
  + Keep the following number of major versions: 100
  + Yes for Require documents to be checked out before they can be edited
  + OK and return to the MyDocs library
* Check out your Demo document from earlier
* Add some additional text to the document and Save the changes in Word
* Close the document
* Check the document in
  + In the Check In Dialogue, look over the options for Version
  + Select Minor version and add some comments
    - Note that Visitors to a Library can only see Major versions, not Minor versions
* View the Version History of the document by selecting Version History from the header and navigation (select the documents first)

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* To restore the document to the original version, hover over the version and select Restore from the dropdown.

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* If you have not checked the document out, you will be prompted to do so. Check the document out and restore it to the original version. Check that this has in fact restored the original version.

### Task 3: Working with Team Site Libraries

Explore how you would share a library with another user; try the “Shared with” setting in the Library settings. Work with another student to see what happens when you make changes to a shared document.

## Challenge Task

As you will be using libraries extensively later in the semester when you are working in a group, this task asks you to share a library with another user. You should do this with another student. Once you have shared the library, you should create a document in the library, and both make changes to it to ensure that you are comfortable with how SharePoint manages version control.

## In the next lab:

The next three labs will be looking at various aspects of workflows.

Version 1.0: 23rd August 2016

Version 2.0: 28th August 2017

Version 3.0: 14th May 2018

Version SPO: 30th January 2019

Version SPO.1: 12th August 2019

Version 3.1: 28th April 2020

Version 3.2: 17th July 2020

Version 4.1: July 2022