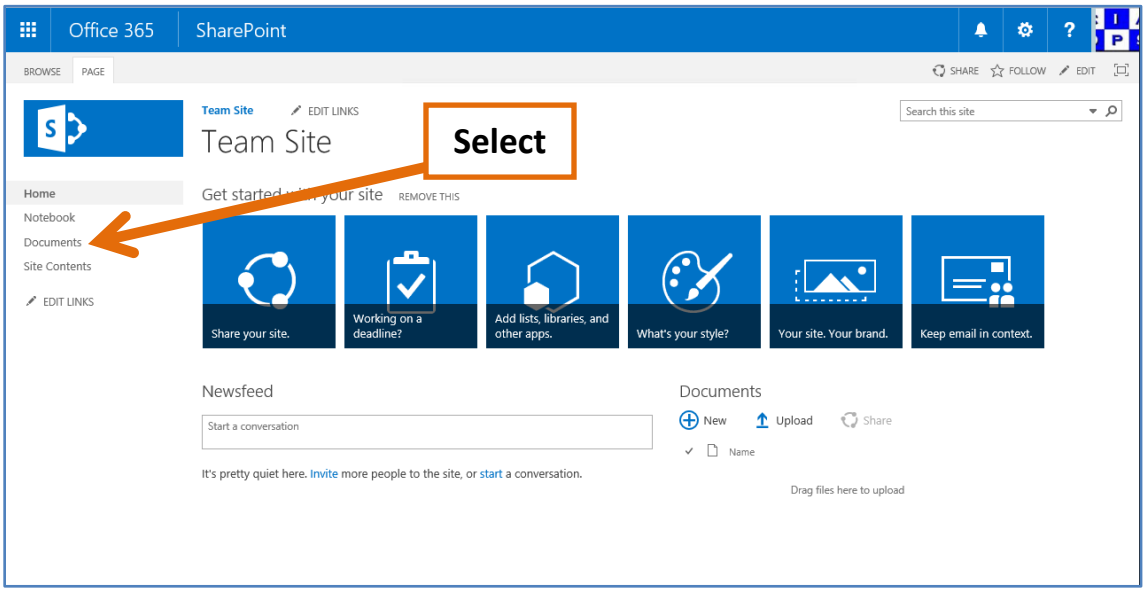
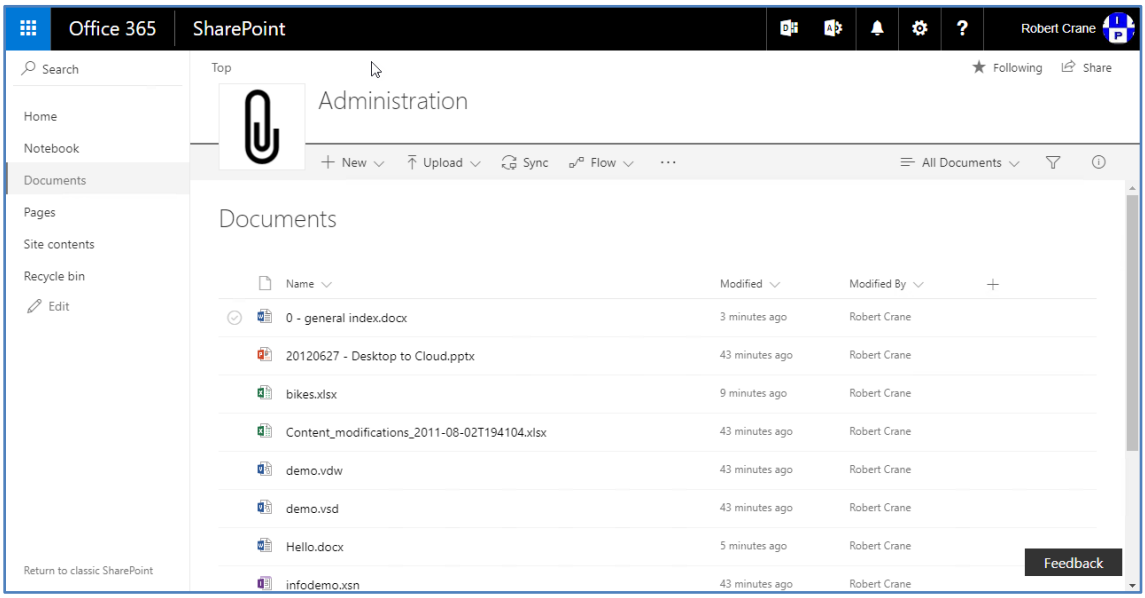
Document Libraries

Select the **Documents** link that appears on the Quick Launch Menu on the left hand side of the SharePoint Team Site.

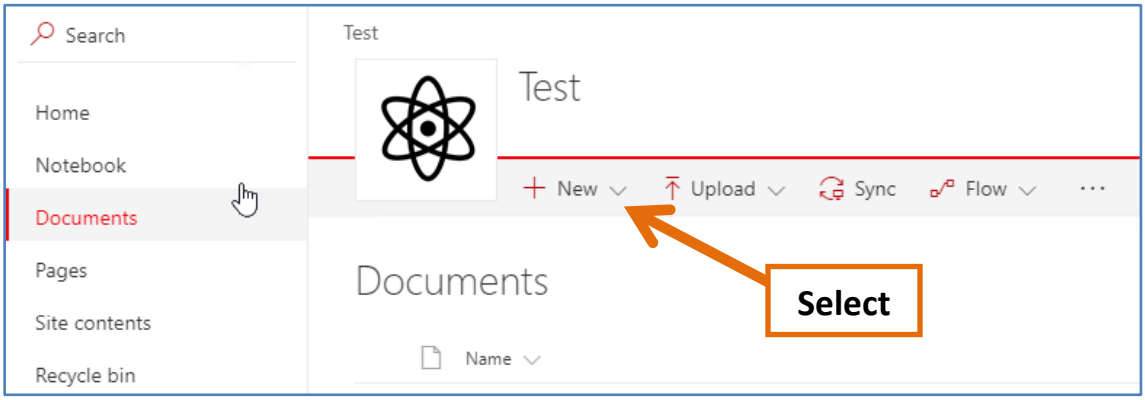


You should now see a screen like:

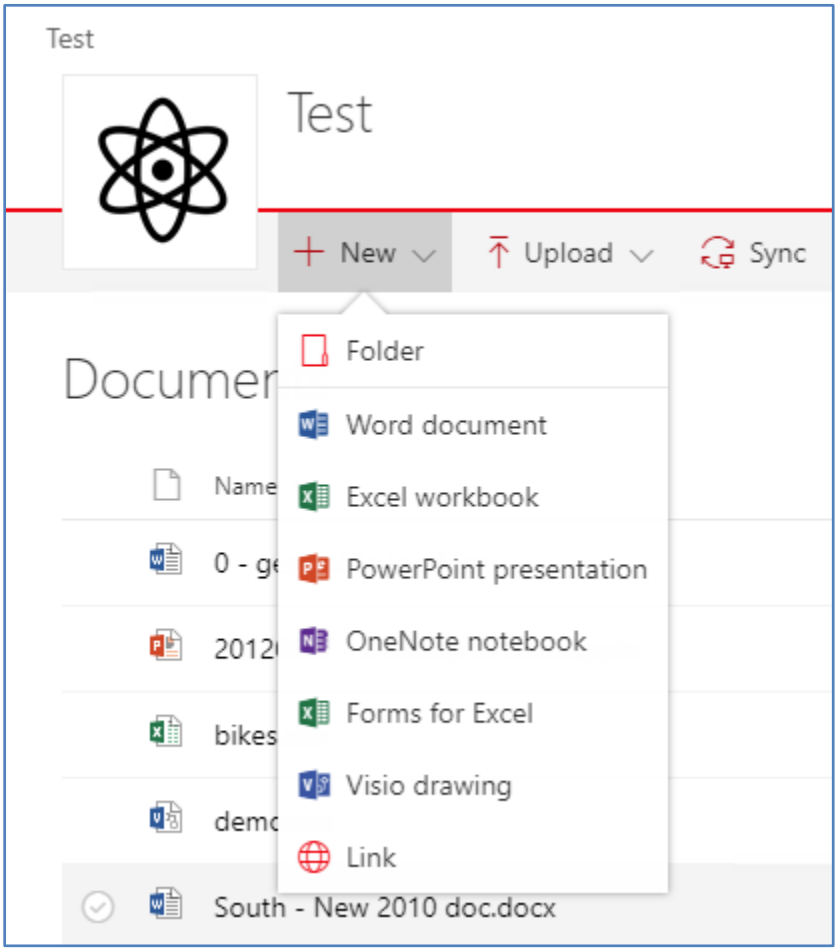


The *Documents* area in most Teams Sites is known as a Document Library in SharePoint. In here you can store any sort of file you wish including things like word processing and spreadsheet files.

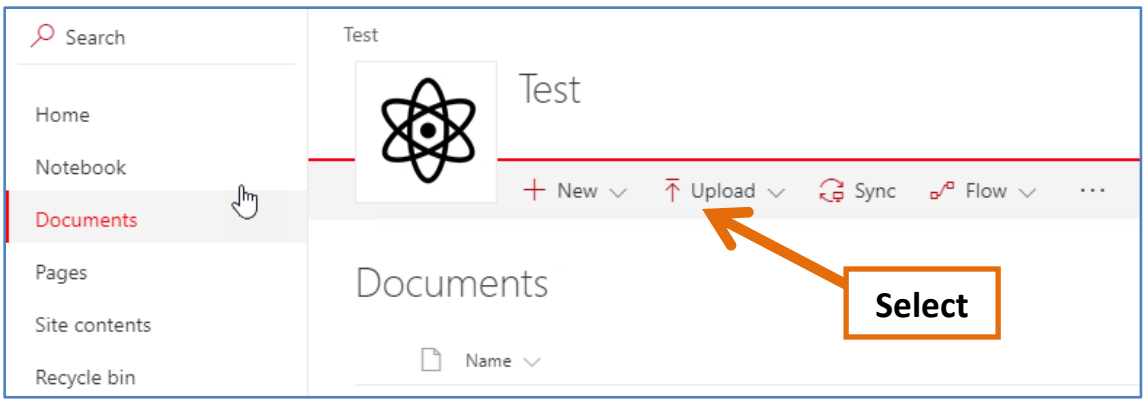
The first step in using a Document Library is to upload some documents. To do this, click on the **New** link on the menu bar just above the Document Library name.



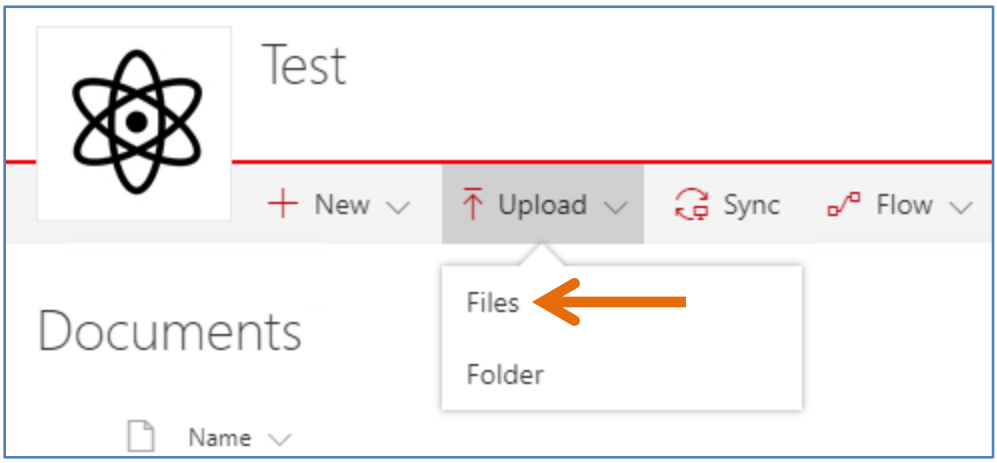
You should now see a menu appear like:



You can create new Microsoft Office documents quickly here right from the browser. You can also create folders as well, just like a traditional file system.

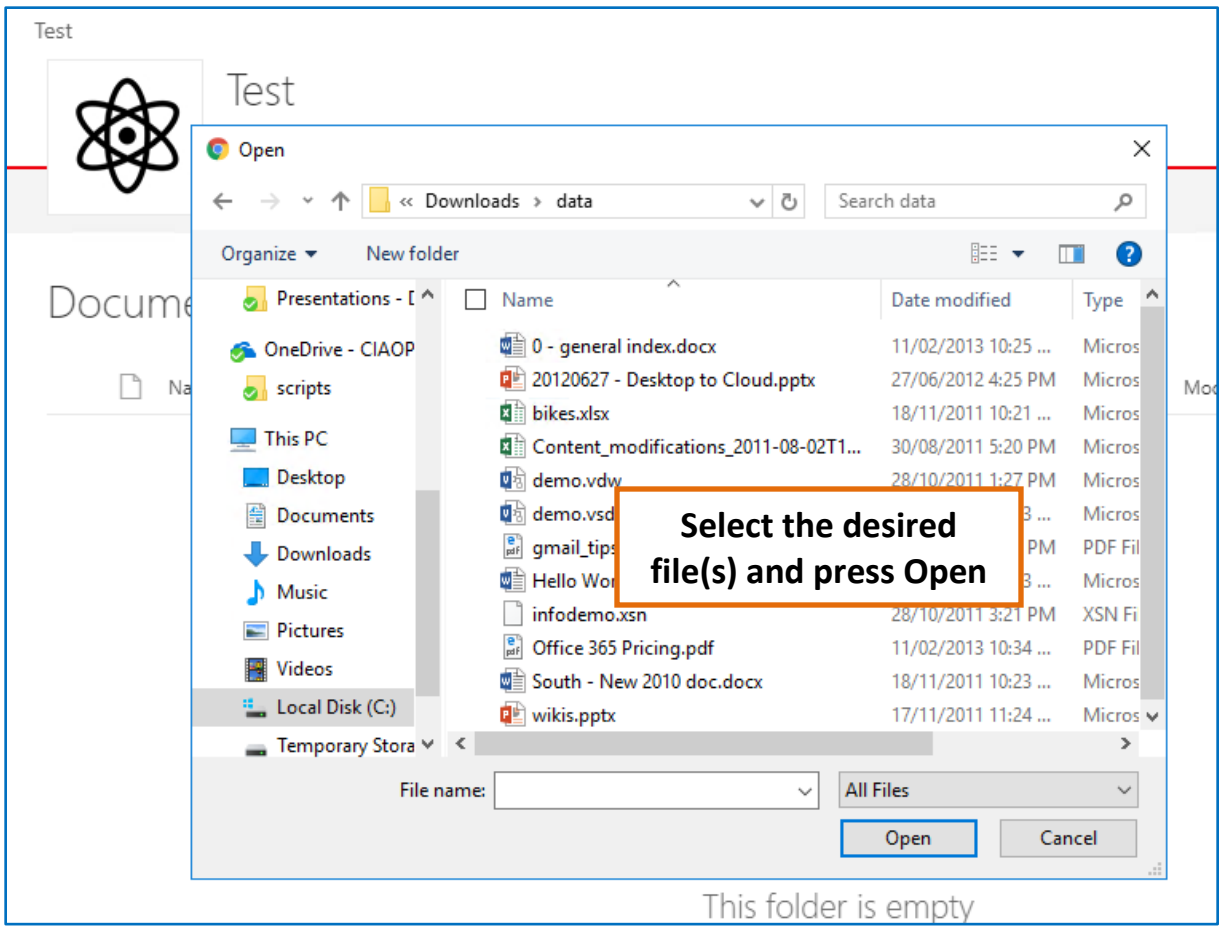


Now select the next option on the menu, **Upload**.



You should now see the menu shown above with options for *Files* and *Folder*. Select **Files** to continue.

There are many ways you can upload files into a SharePoint Document Library. The simplest way is via the browser but that may not always be suitable for substantial amounts of documents. This tutorial only covers the most basic options to help get you started but always remember that the methods shown here are not the only ways to get your information into SharePoint Online.



A Windows Explorer window will now typically open and you can browse to the location of the file(s) you wish to upload. Select one or more files you wish to upload.

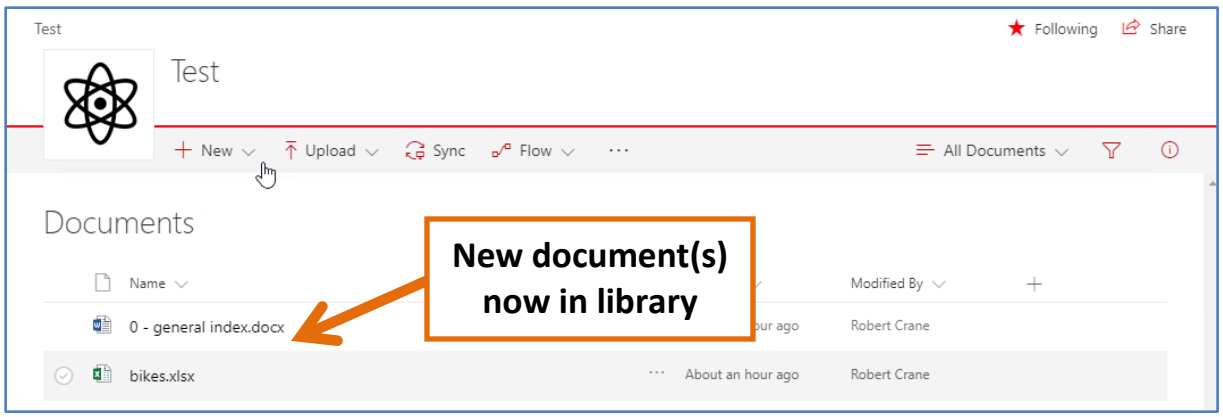
Note that the *Overwrite existing files* option is checked by default. This means that if an existing file of the same name already resides in the destination it will be overwritten by this new file. You can uncheck this option if required.

You should also note that there are a number of file types that cannot be uploaded. The details of these files can be found at:

> http://office.microsoft.com/en-au/office365-sharepoint-online-small-business-help/types-of-files-that-cannot-be-added-to-a-list-or-library-HA101907868.aspx#_Toc355959797

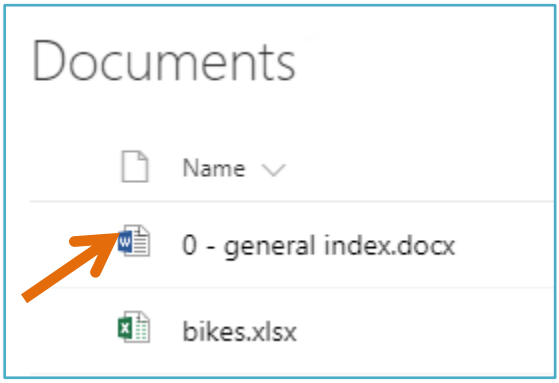
There is also a limit on the maximum file size that can be uploaded to SharePoint Online. That limit is currently 10GB for a single file.

To upload the selected document to the *Documents* area of your Team Site, simply press the **Open** button.



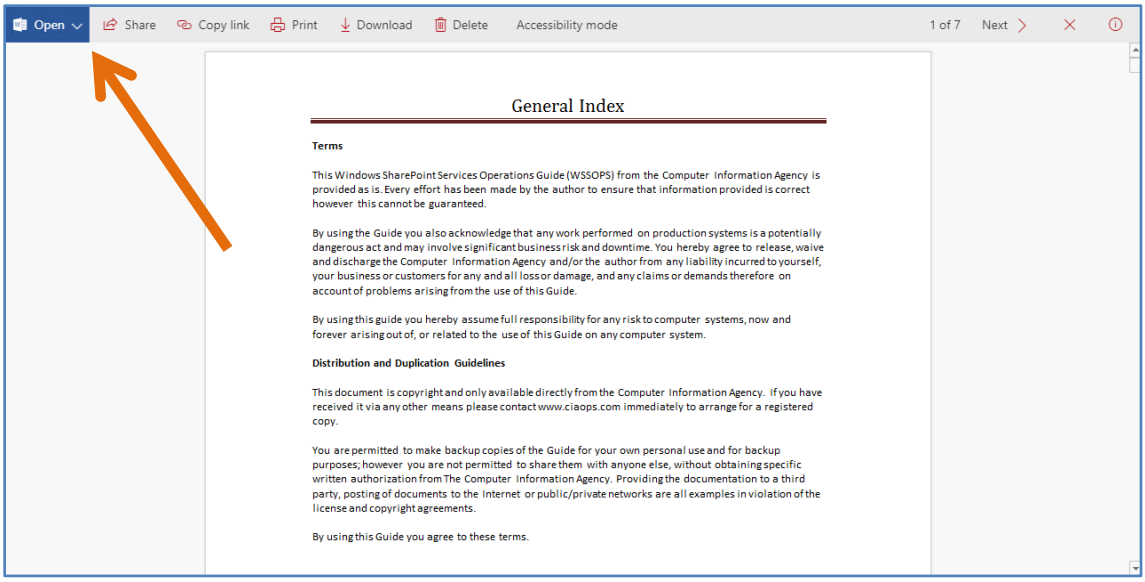
The amount of time it takes to upload the file depends both on the size of the file you are transferring and the speed of your Internet connection.

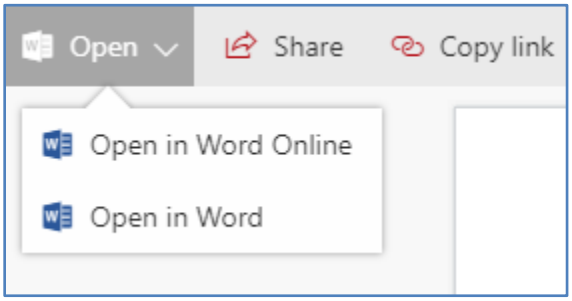
When the upload is complete you should now see the document(s) you selected appear in the list for the Document Library.



In this case, a Word document has been uploaded and the Word icon appears at the beginning of the line to indicate the document type.

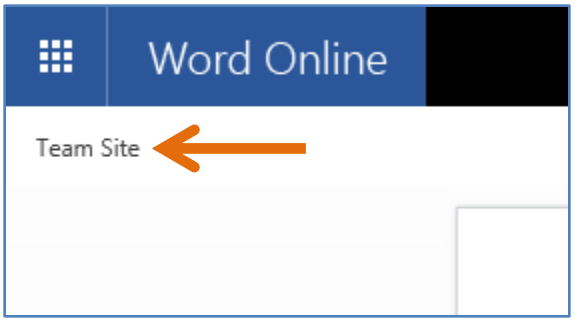
If you now click on the document name it will attempt to open. You will generally only be able to view the document if you have the corresponding application on your local machine. However, in the case of Microsoft Office documents like Word, Excel, PowerPoint and OneNote the file will automatically open in a browser for viewing like so:

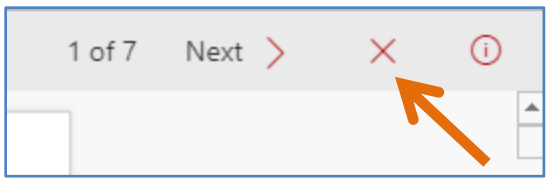




You'll see that there is also an option on the menu bar to **Open** (*Open in Word Online* or *Open in Word* is available) giving you the opportunity to edit the document either in the native desktop application or directly in the web browser.

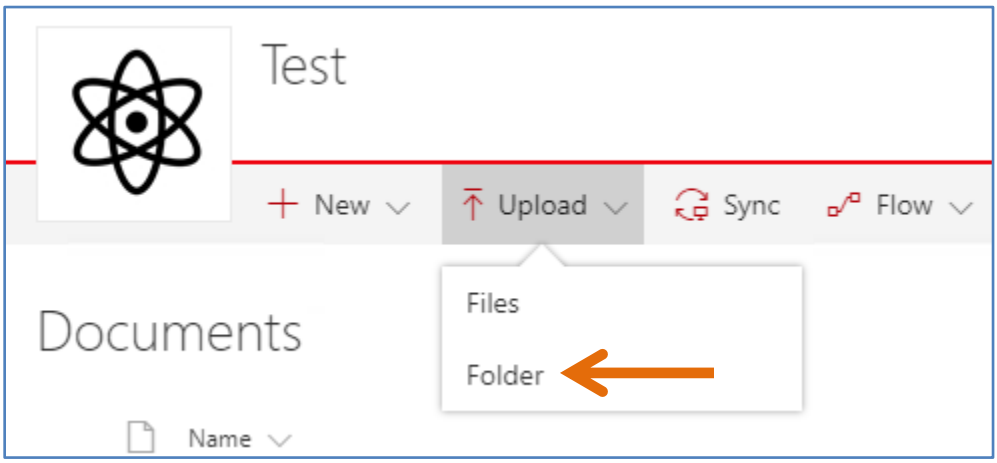
Every SharePoint Online plan includes the ability to view and edit Office documents in a browser.



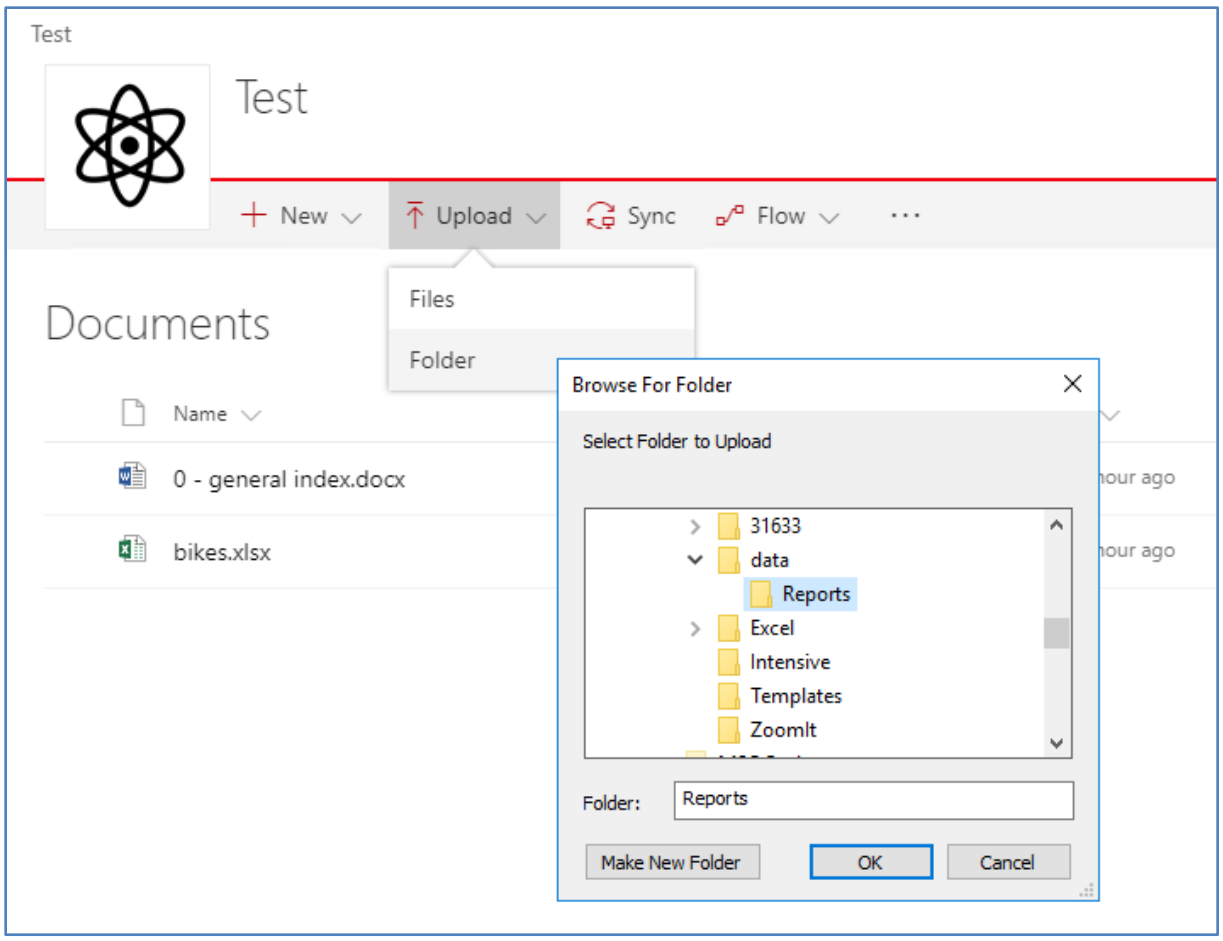


To close the document and return to the Team Site select the Team Site name (here **Team Site**) in top left or the **X** icon in top right. What you see depends on your current version of SharePoint Online.

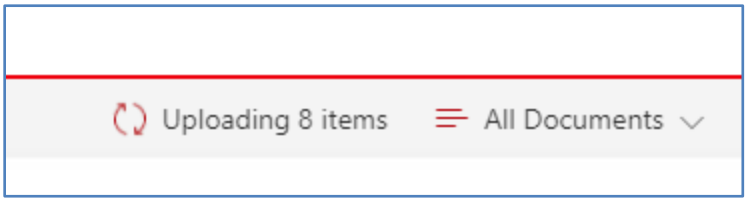
You can repeat the process of selecting **Upload** and then **File** in the Document Library, locating the desired file(s) and finally selecting **Open** to upload. Please take the time to upload a few different documents into the Document Library area using this process.



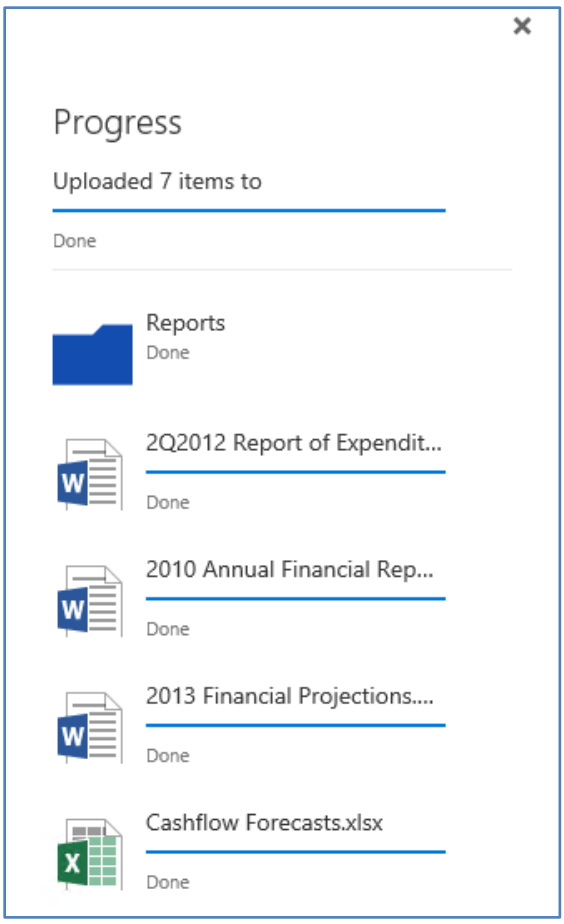
Return to the **Upload** option on the menu bar and select **Folder**.



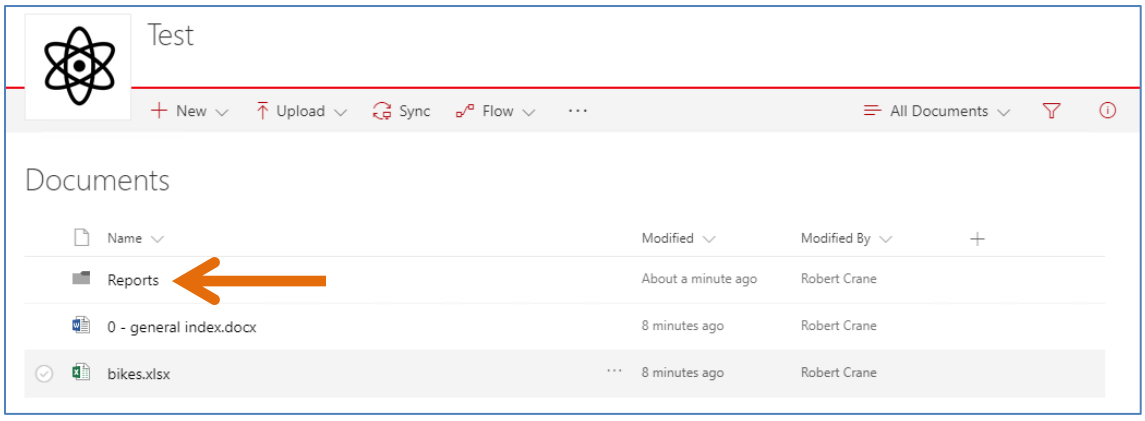
A Windows Explorer dialog will open on the desktop. Navigate to the folder you wish to upload into the Document Library and select it. Then press the **OK** button to commence the upload.



In the upper right, along the menu bar, you will a status icon showing you how many files are being uploaded. The double arrow icon at the beginning of this will continue to spin while the files are being uploaded.



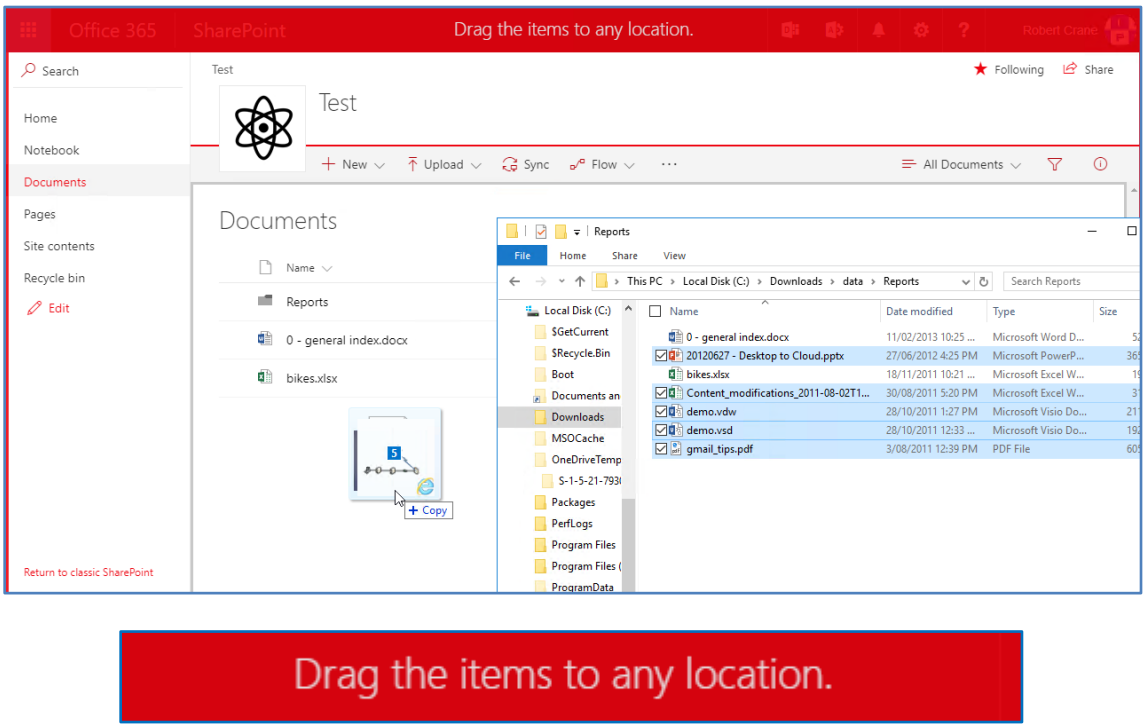
If you click on this upload status icon you will see a list and progress status of all the files in the folder you selected being uploaded.



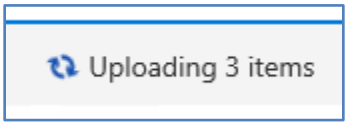
When the process is complete, the status icon will disappear and you should now see the folder you select appear in the Document Library as shown above.

The time that this copy process takes depends on the file sizes as well as the speed of your connection to the Internet.

Another way that you can upload files to SharePoint is to drag and drop them directly onto the browser page. This is a new feature of SharePoint 2013 in general and is supported for most Document Libraries. It is also supported when using current browsers, including non-Microsoft ones such as Firefox and Chrome.

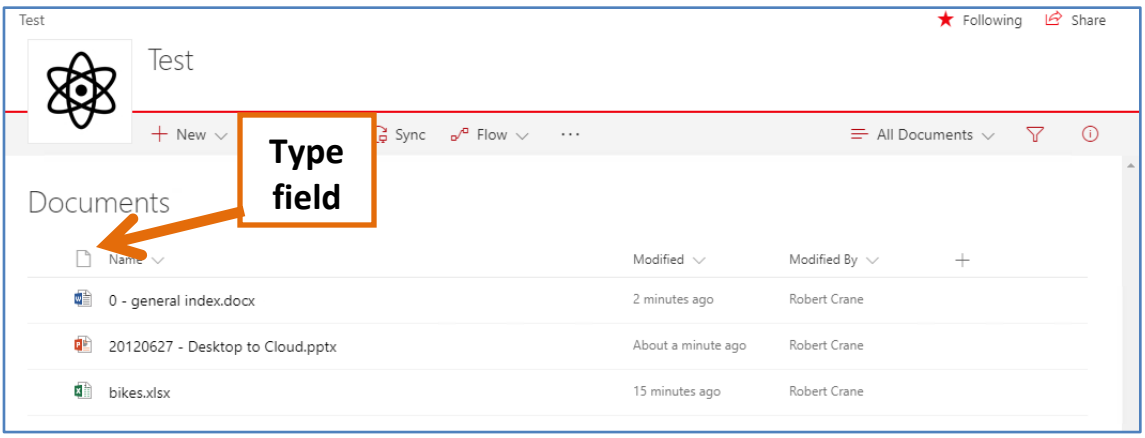


Simply drag and drop the desired files onto the list of files in the Document Library as shown above. When you drag the files to the correct location you should see a border around the library appear, the background should fade, the text *Drag items to any location* should appear at the top of the page.



If you now drop the files into the library you will see the familiar uploading icon in the top right, which when clicked will show you the individual progress of each file.

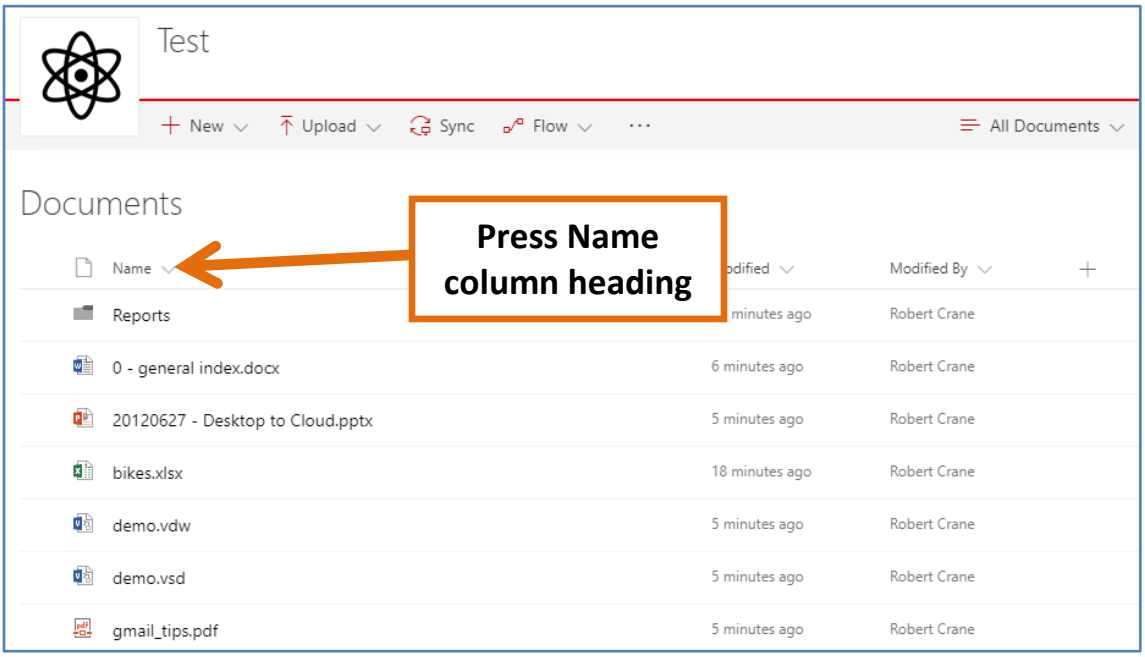
Once the files have been uploaded they will appear as any newly uploaded file to the library would.



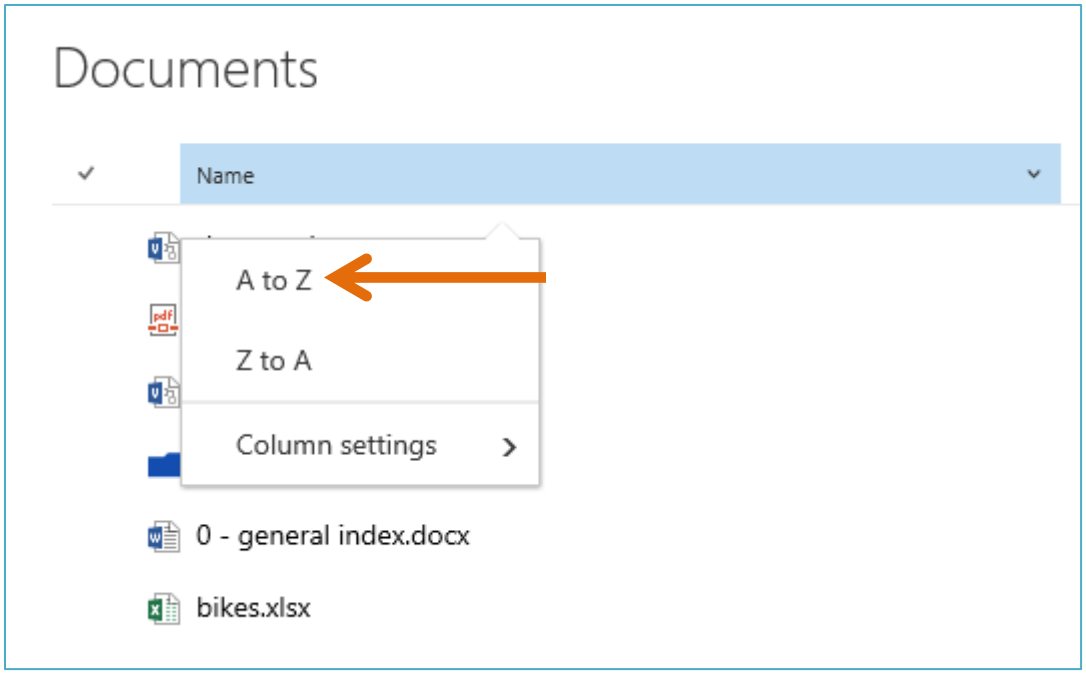
Once you have uploaded a few documents into *Documents* your Document Library should look something like what's shown above.

You will notice that some files display a distinguishable icon at the beginning of the file name (typically Microsoft Office documents) while others don't.

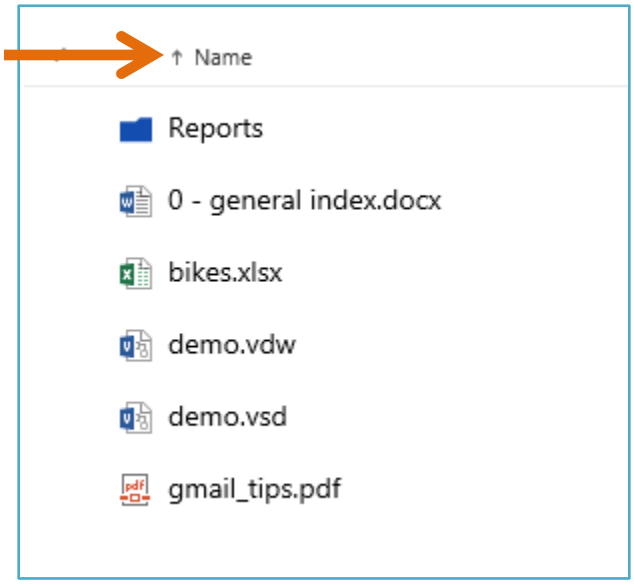
You may be wondering why using a SharePoint Document Library is any different from storing the file in folders on your local computer. Here are some examples of the added functionality that SharePoint can provide.



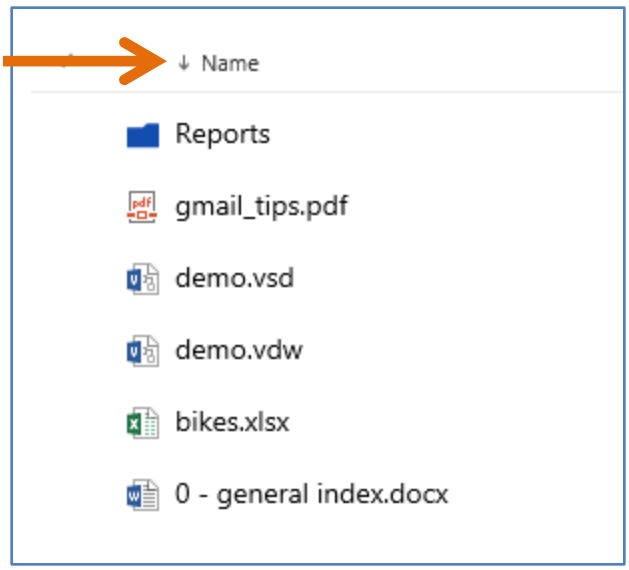
If you click once on the word **Name** in the column heading directly above the first file you uploaded you should see a menu appear.



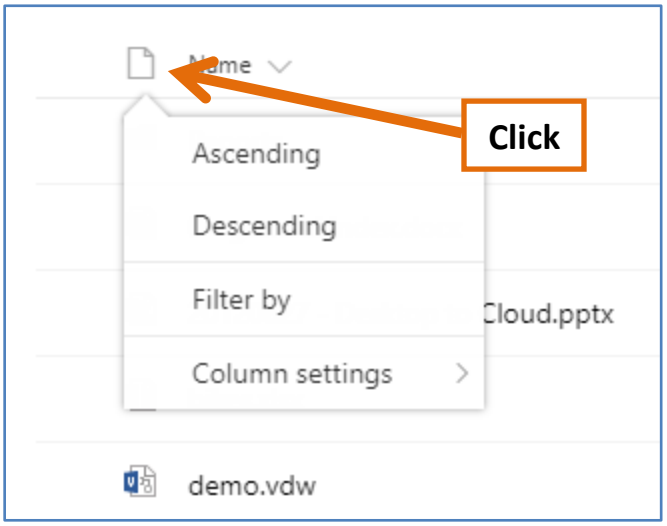
Select the **A to Z** option say.



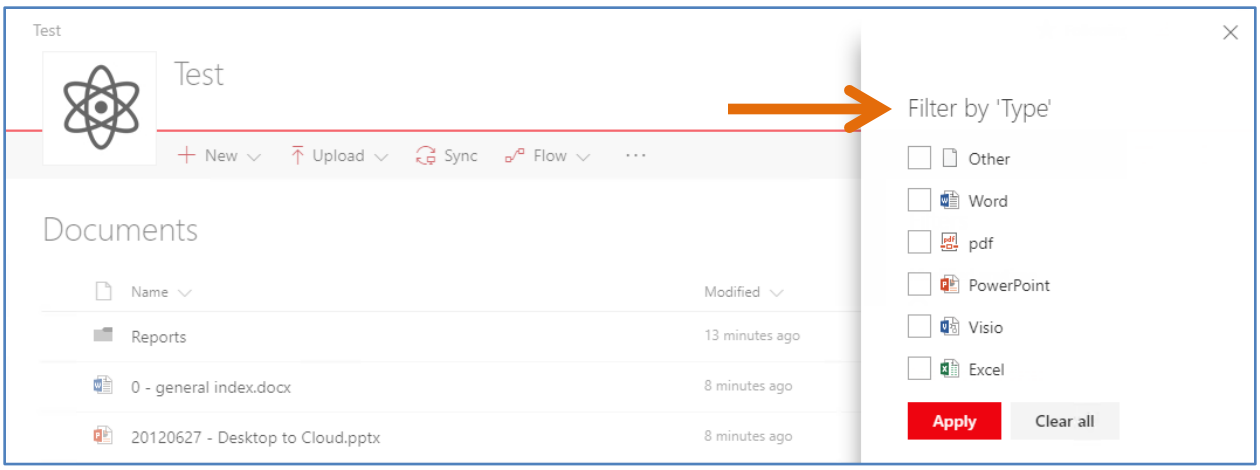
You'll now see that the list is sorted in the manner you selected and there will also be a small arrow next to the column name. This indicates that the Document Library file list is sorted alphabetically from A to Z. If you click the **Name** field again and change the sorting order you should see that the arrow now point down and the documents in the Document Library are arranged from Z through A automatically.



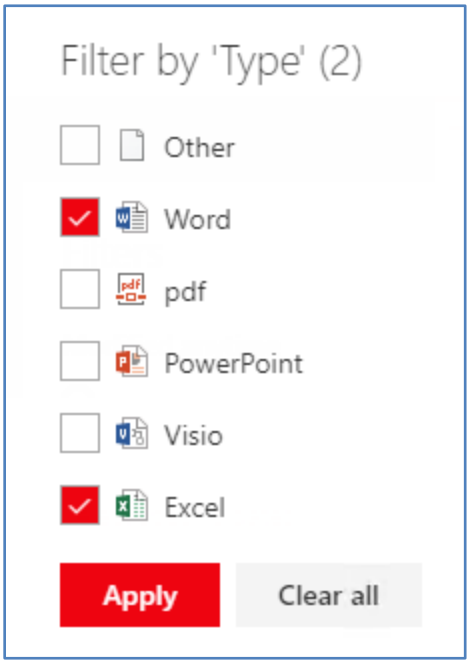
You can repeat this sorting process by clicking on any column heading.



If you select the *Type* field heading a menu should appear appears as shown above. If you now select the **Filter by** option

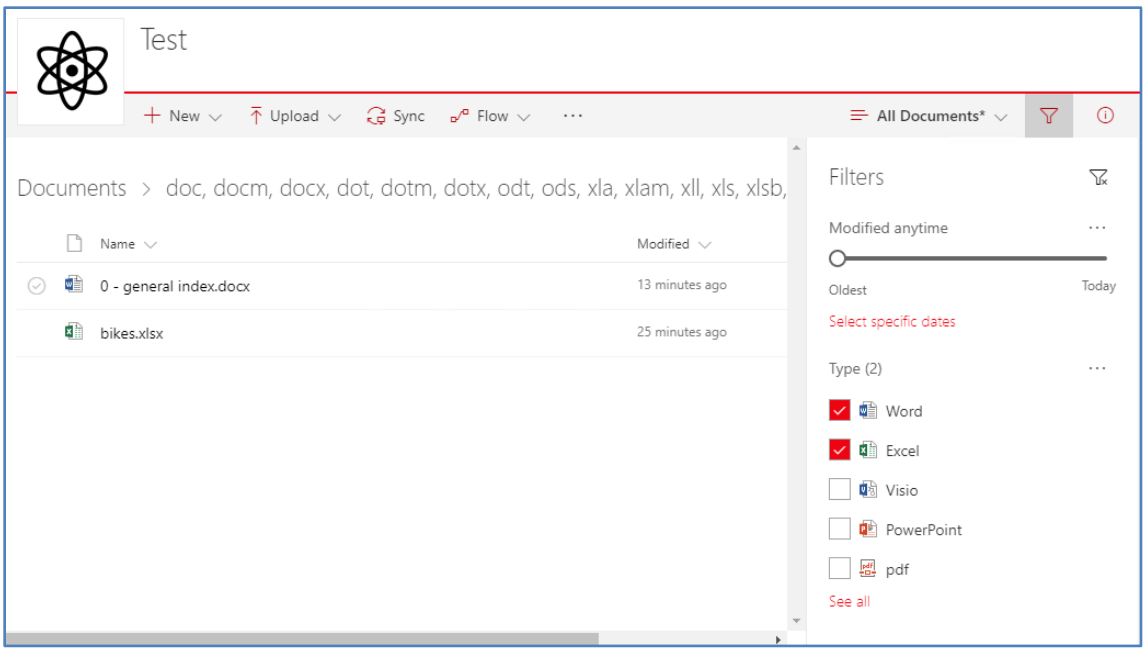


A *Filter by 'Type'* pane should appear in the right of the page.



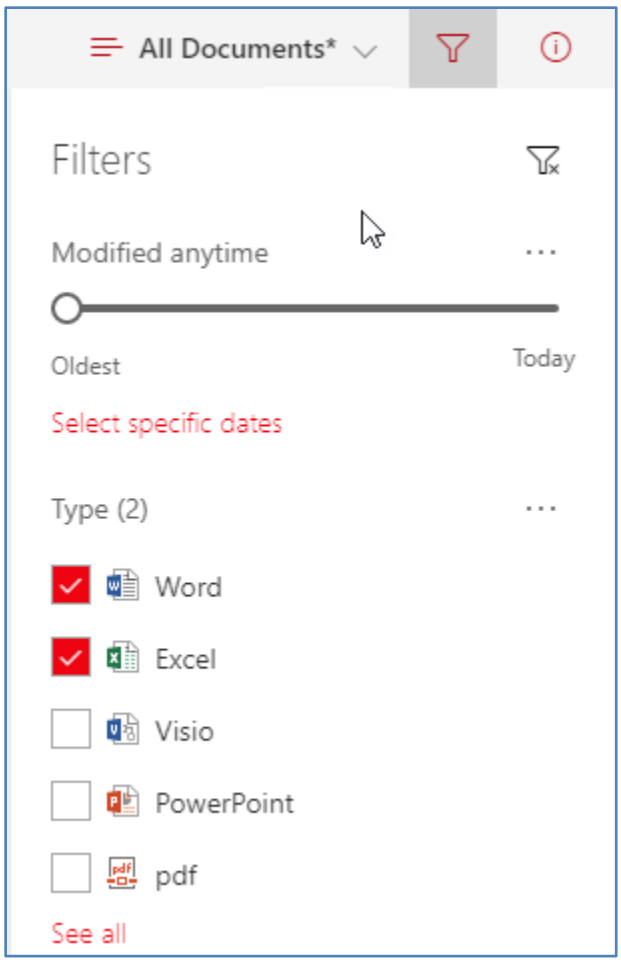
Select the **file types** you wish to see by placing a check mark next to that type and selecting the **Apply** button at the bottom to confirm your selection.

Not only can you sort information in the Document Library but you can also filter what you see.

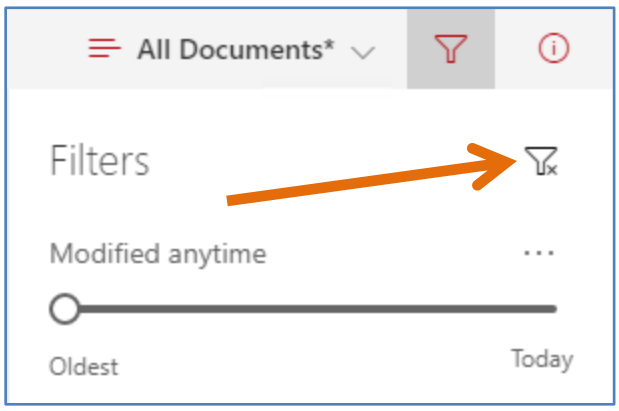


The Document Library will now only list the files with a file type that matches your selection as shown above.

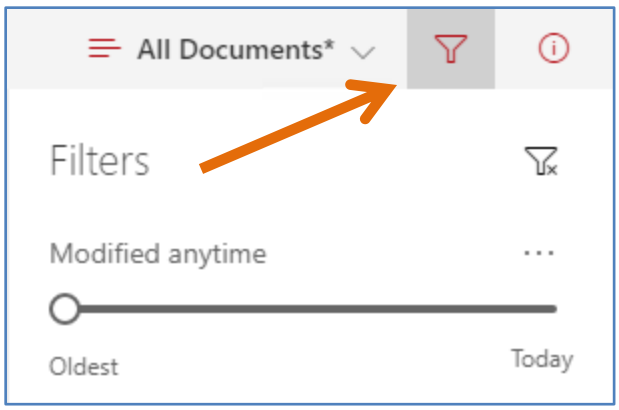
You can apply this filtering process to just about any column in the Document Library.



You can adjust your filtering selection from the pane that appears on the right of the window.

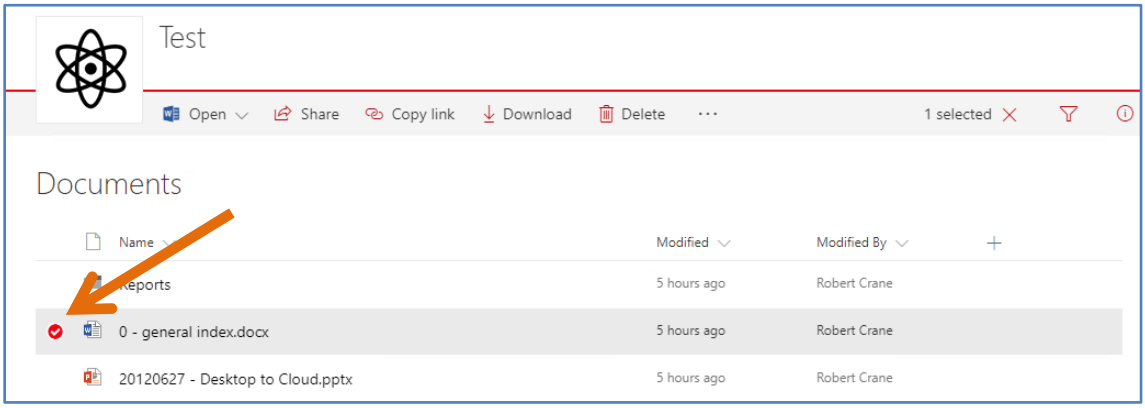


You can clear all the filters by selecting the **Clear Filter** icon.

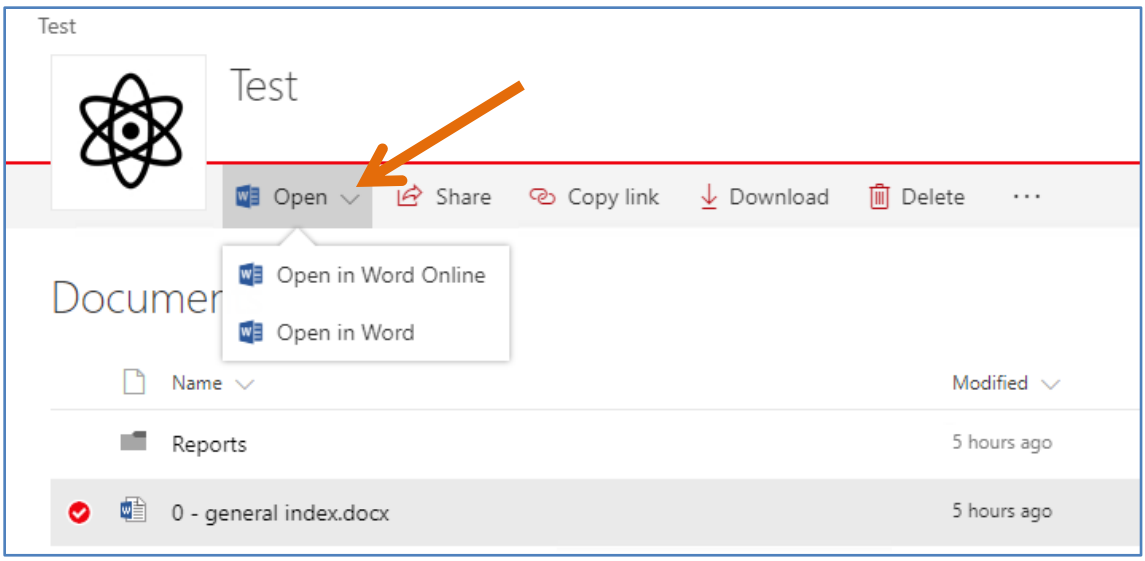


You can close the *Filter Pane* by selecting the icon show above.

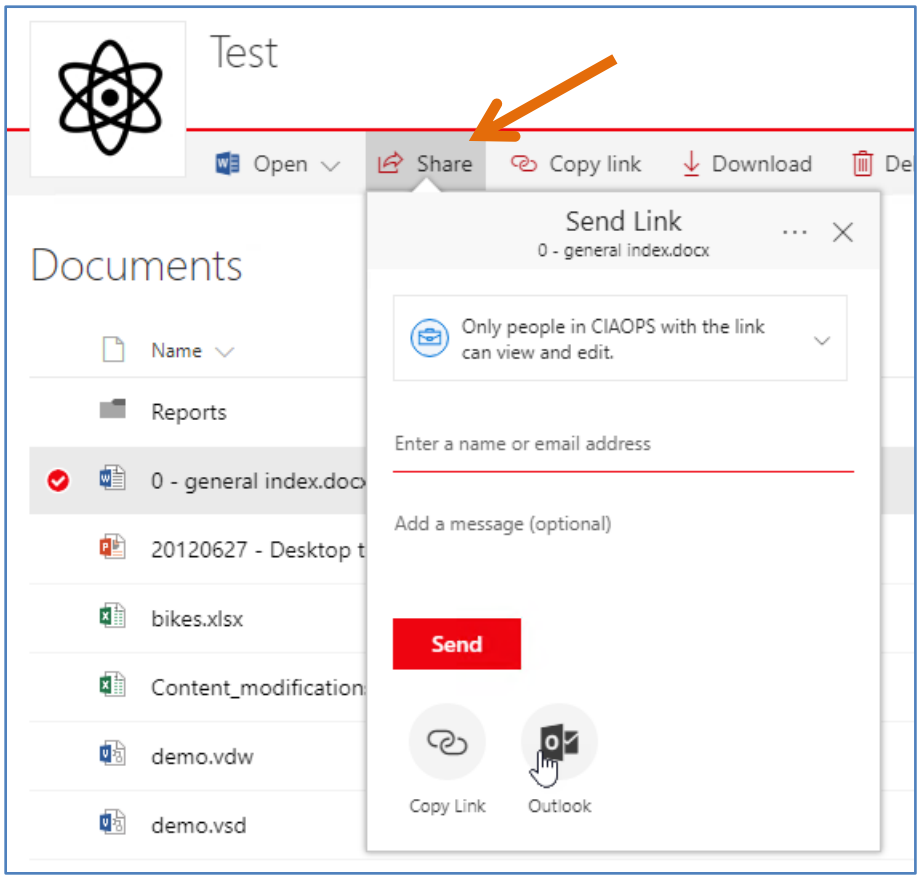
Filtering can be applied to single as well as multiple columns within SharePoint. Imagine how much easier it would be to locate documents this way rather than simply using file folders stored on your local computer.



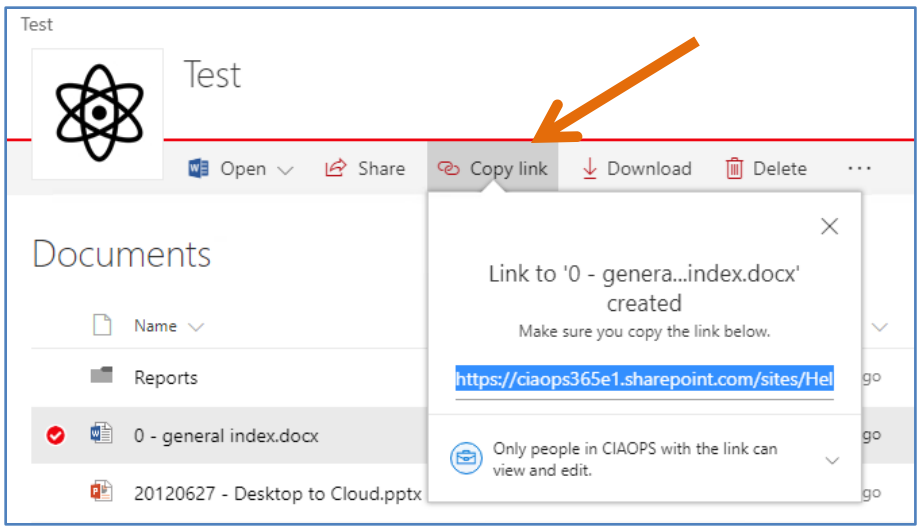
You can select an individual file in the Document Library by clicking the selector to the left of the file name as shown above. When you do this, you will note that the whole row is highlighted and that the menu across the top of the Document Library also changes.



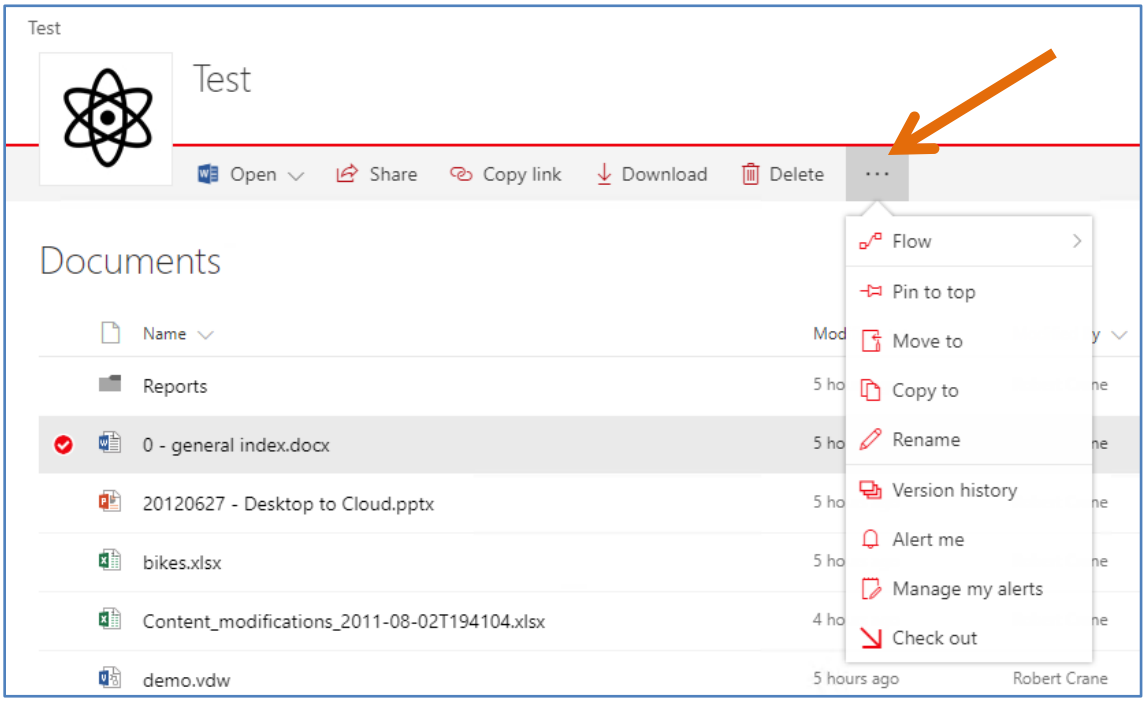
The menu will now allow you to open the file is a browser or via the desktop application (if it is a Microsoft Office document).



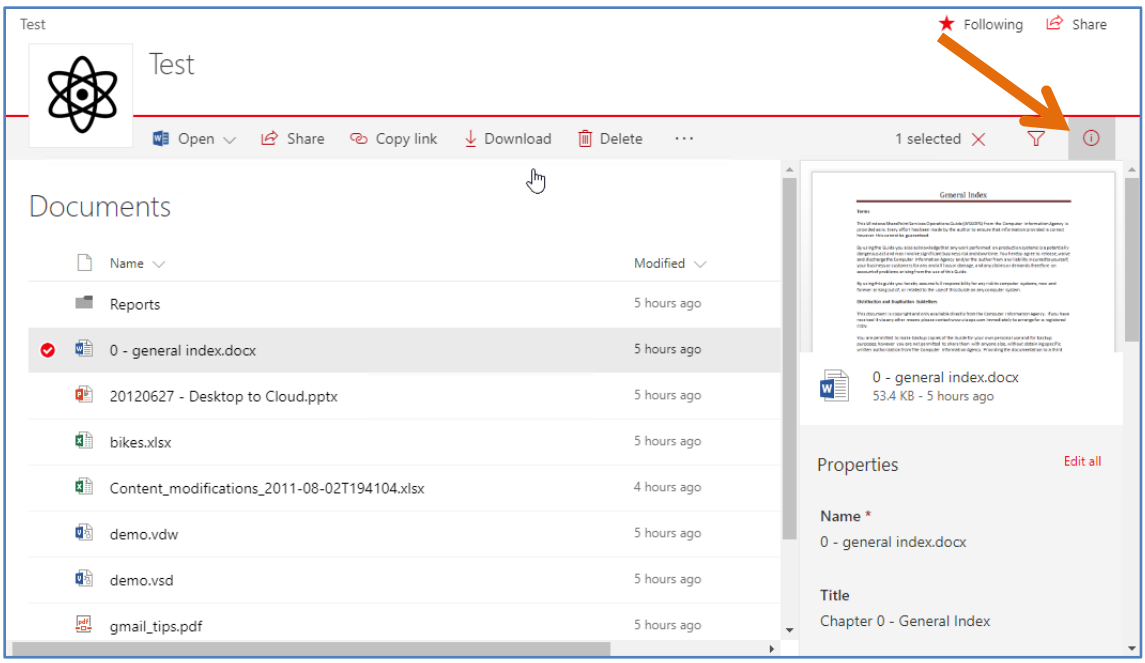
You can also share that document with people inside and outside your organisation via an email invitation.



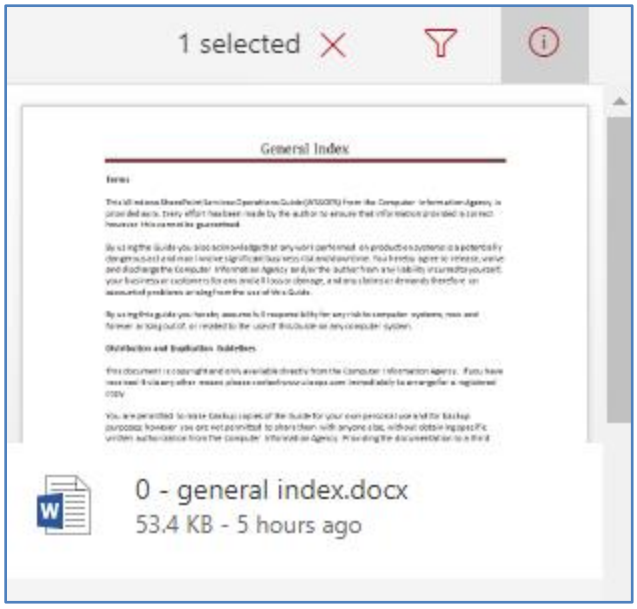
You can also share the file just via a link.



If you select the ellipse (three dots) on the right side of the menu you'll see a range of options available to this file including copying and moving, renaming, viewing the versions history and setting up email alerts.

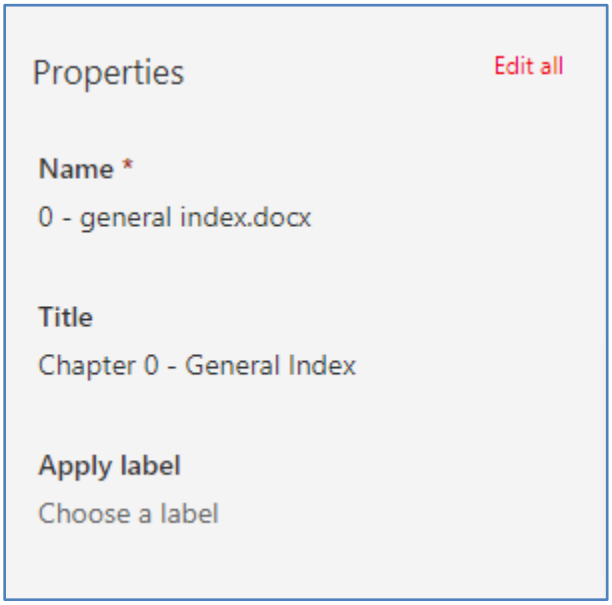


With the file still selected, if you now select the *Details* icon at the very right-hand side of the Document Library you will see a new pane appear from the right as shown above.

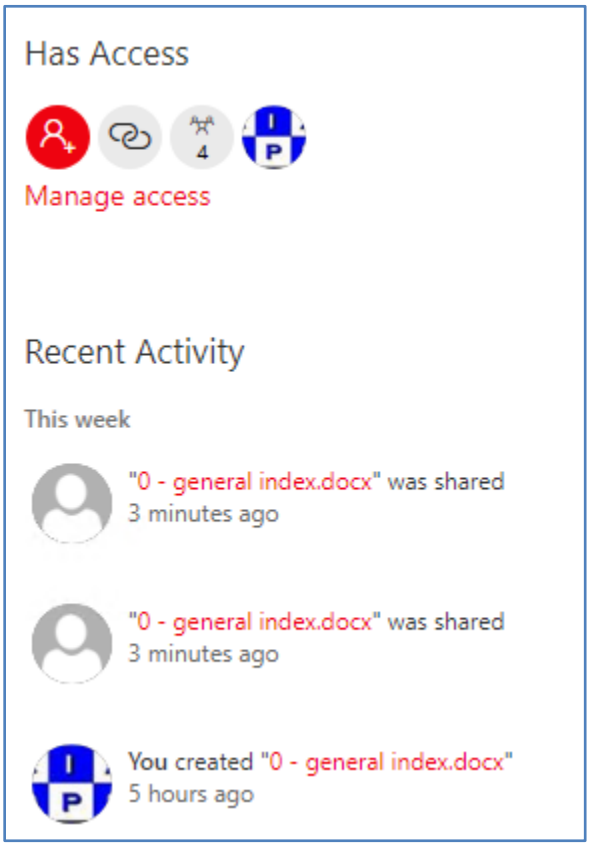


The *Details* pane will provide you with a live preview of the file (if possible), that you can navigate through. If the document has a supported SharePoint file previewer you will see a full thumbnail preview of that document displayed in a dialog window. Documents that support this preview ability include Microsoft Office documents and image (JPG, PNG, GIF, etc) files. For documents that do not support a preview you will only see information about the file.

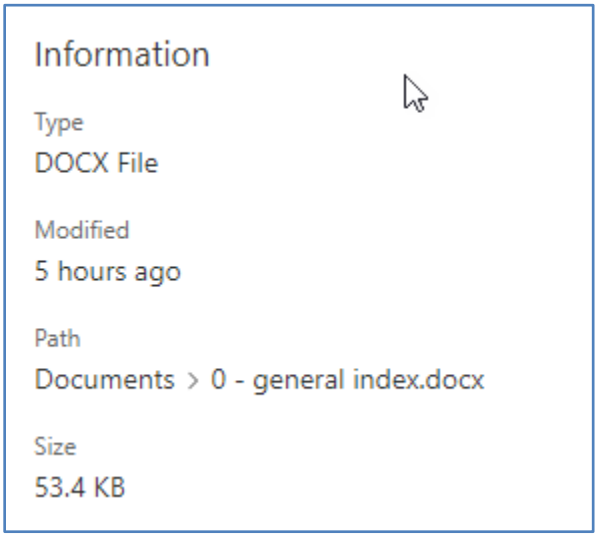
For files that support previews you will be able to scroll through the document by dragging the mouse cursor or using the *Page Up* and *Page Down* keys directly in the preview window.



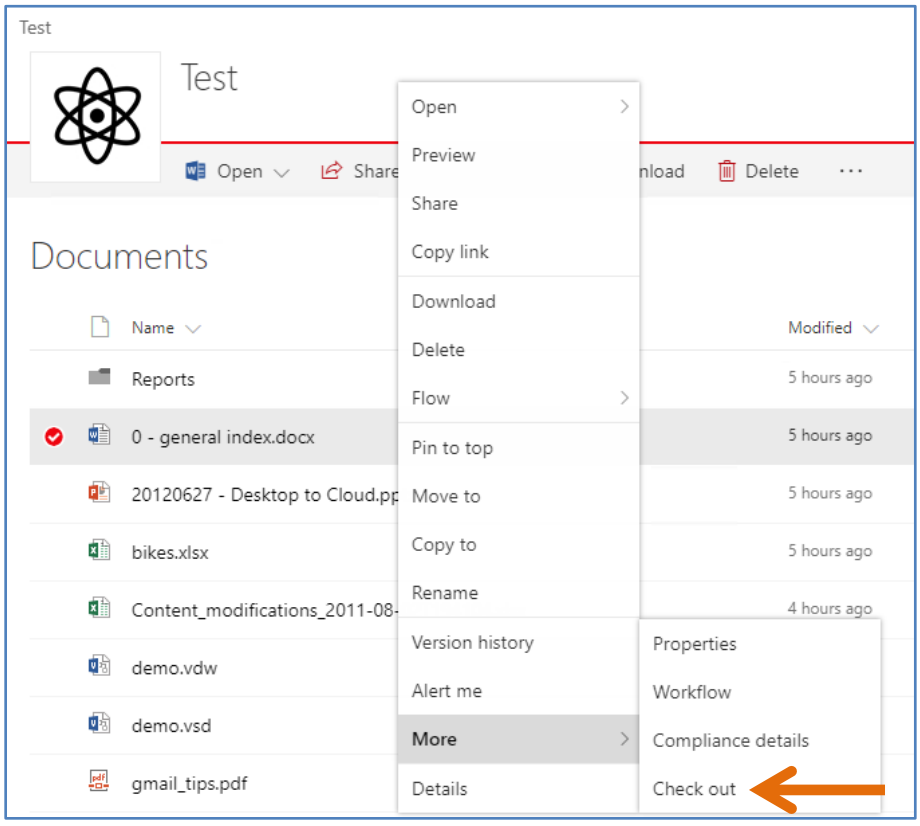
It will also provide access to the document properties which you can edit directly.



You'll be able to see and manage who has access to the file as well as see the recent activity on that file.



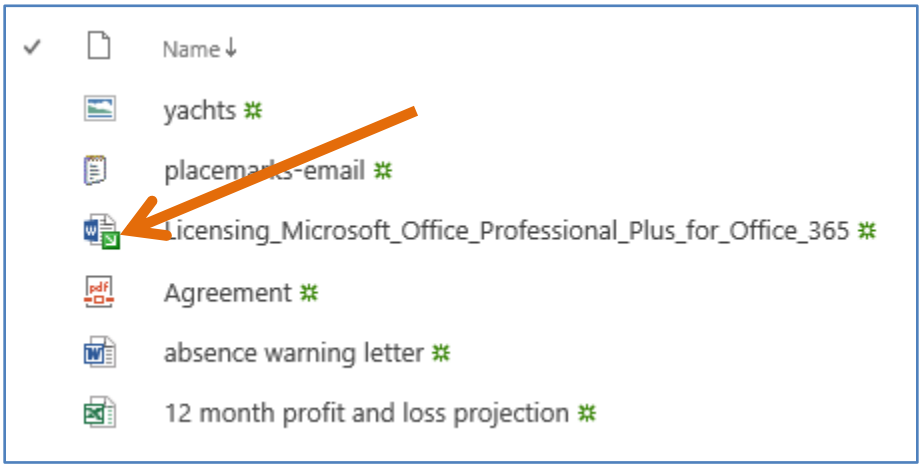
At the bottom of the pane, you'll also see the specific details of that file, including details such as the size of the file.



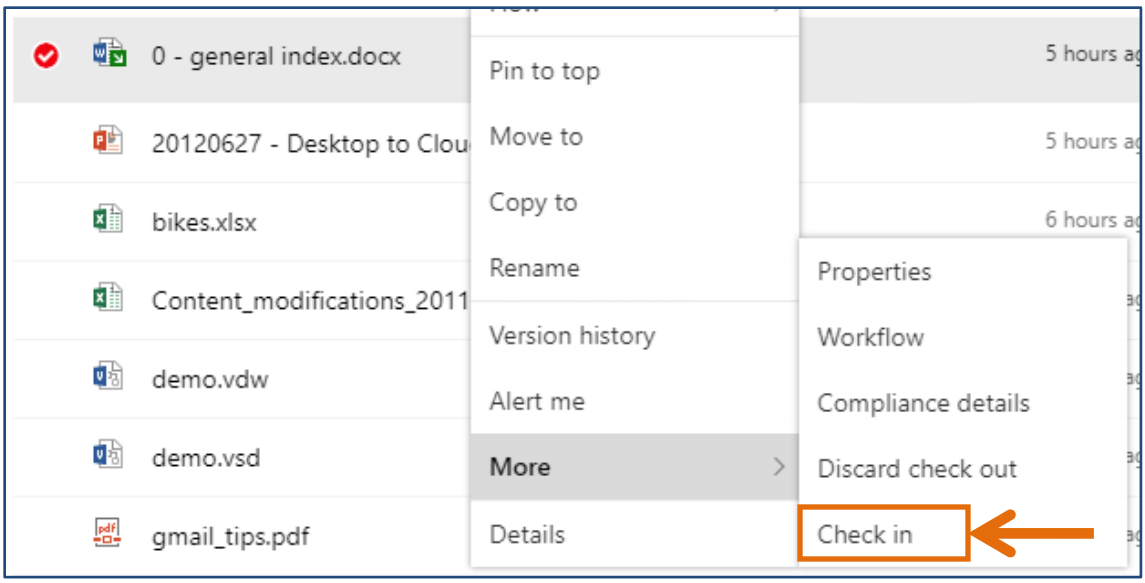
Not only can you access information about the select file from the menu at the top of the Document Library, the *Details* pane but also by simply **right mouse clicking** on the file which will display a menu like that shown.

Under the **More** option you will notice that an option called *Check Out* is displayed. This is because SharePoint can function as a basic document management system. By checking a document out the author is able to make exclusive changes to the document. By default, files saved into Document Libraries support "co-authoring". This allows multiple people to edit the file at the same time. However, if you want exclusive access to the document to make changes, you should check that document out using this menu option.

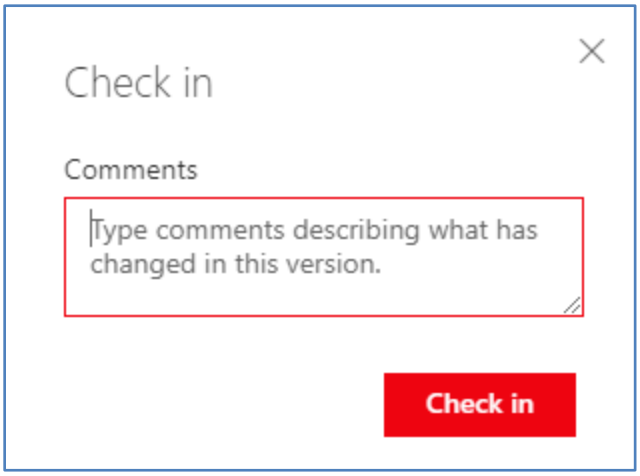
When a document is checked out, others are only able to access a read only copy until the file is checked back in. Go ahead and select the **Check Out** option from the menu.



Once the document is checked out you will now see it has a small green icon with an arrow in it on top of the normal *Type* icon. This indicates to other SharePoint users that that document is currently checked out and unable to be edited by everyone. As the person who checked the document out you are now free to make changes to the document without fear of anyone else also making changes. These changes will not be seen by other users until you check the document back in. Other users are able to view the original document but not make changes until you check the document in again.



To check the document back into the Document Library, right mouse click on the file name again, select **More** from the menu that appears then **Check In**.



When checking the document back into the Document Library you are prompted to enter information about the changes that you made. By providing optional comments you are creating an audit trail for that document that makes it easier for others to understand the changes you have made. Press the **Check In** button when complete.

SharePoint also provides you with the ability to retain a version of each document you check into a Document Library. This means that you can easily roll back to a previous version if required.

In summary, you should now be able to begin to understand some of the features of Document Libraries that make them superior to normal folders on your local computer.

Glossary

Alerts – Are settings that can be made to most components of SharePoint that will send an email to inform of changes in information. They can be customized in respect to what triggers the sending (change, delete, addition, etc) as well as the frequency (immediate, daily, weekly, etc). They are configured by each individual SharePoint user normally at the location they wish to monitor.

Document Library – Are storage locations in SharePoint specifically designed to manage any sort of document (Word, Excel, PDF, etc). Once here, documents can easily be sorted and displayed. It is also possible to configure check in/check out as well as document approval to give better document management than what is normally provided in folders on the local computer.

Office 365 – Is hosted versions of Microsoft Exchange, SharePoint and Lync. They can be purchased as a suite or individually. All of the servers live in Microsoft data centers but can be accesses anywhere an Internet connection is available.

Office Web Apps - is an add-on component to SharePoint that allows Office documents to be displayed and edited in a web browser. Office Web Apps is part of Office 365 by default.

Picture Library – Are similar to Document Libraries but they are specifically designed for the management of images (JPG, BMP, TIFF, etc). They share many features with Document Libraries including the ability to check in/check out document as well as document approval. Importantly, Picture Libraries allow additional descriptive information to make locating images much simpler.

Quick Launch Menu - Is the list of links that normally appear down the left hand side of most pages in a SharePoint site. Clicking on any of these links will take you directly to that location in the SharePoint site.

Recycle Bin – An area into which most items that are deleted go upon deletion. This allows them to be easily recovered if needed. Beware that the contents of the Recycle Bin are not retain indefinitely.

Ribbon Menu – Much like the ribbon that is evident in Office 2010 and 2013 products SharePoint 2013 will now display a ribbon menu to provide you with a greater range of options. The ribbon menu is context sensitive only showing you the options that are available depending on where you are located in SharePoint 2013.

SharePoint – Is the Microsoft technology on which the Office 365 Team Site is based. It is a web front end onto a database in its simplest form. It is accessed via a standard web browser but provides much greater functionality when viewed with Internet Explorer. SharePoint can be used to manage a variety of information sources from documents to ad hoc lists with everything inside it being fully indexed for search ability.

SharePoint Online – Is the hosted version of SharePoint Server 2010 provided by Microsoft via Office 365.

Site Collections – are logical containers for a top level site and child sites below it. It has unique security, sharing, features, galleries, solutions and storage options. Site Collections are created and managed via the SharePoint Admin center in Office 365. Each Site Collection must be assigned a Primary Site Collection Administrator and optional Secondary Administrators.

Views – Are different ways to display the same data. You are able to have a number of different Views of the same data between which you can easily select. Views can also be used to aggregate data within a list such as summing up values in a column, averaging values, or other aggregation functions.

About

Author - Robert Crane BE MBA MCP

Robert has a degree in Electrical Engineering as well as Masters of Business Administration. He is also a Small Business Specialist and Microsoft Certified SharePoint Professional. Robert has over 20 years of IT experience in a variety of fields and positions, including working on Wall St in New York. Since 2012 he was recognized with a Microsoft Most Valuable Professional (MVP) Award for his work with Office 365. He continues his involvement with information technology as the Principal of the Computer Information Agency. Apart from resolving client technical issues, Robert continues to present at seminars as well as write on a number for topics for the Computer Information Agency including being involved in the SMBITPro community in Sydney. Robert can be contacted via director@ciaops.com.

Company – Computer Information Agency (www.ciaops.com)

Founded in 1995, the Computer Information Agency is a specialized technology consultancy in Sydney, Australia that focuses on assisting businesses and individuals improve their productivity using technology and smart business practices. The Computer Information Agency has high levels of experience in technologies such as Windows Servers, including Small Business Server, and desktop applications such as Outlook, Word, Excel and OneNote.

With special emphasis placed on the business benefits of technology the Computer Information Agency is unique in its ability to work with companies to improve and streamline their processes utilizing the technology they already have in place. The focus is on providing an improved end result for the business which in the long run leads to greater productivity and profitability. More information about the Computer Information Agency can be found at http://www.ciaops.com.