

SharePoint 2016 Document Libraries – End User Training Manual

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Vijai Anand

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- Powershell Scripts: Basic Operations on SharePoint 2013 Online using CSOM, that was published on [C# CORNER](#).
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- Microsoft Office SharePoint® Server 2007, Configuration



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1 Introduction to SharePoint Document Libraries

A **Document Library** is a repository or storage location to store the documents or files and folders. You can use this document library to collaborate on files with other team members. This allows you to upload, create, update, delete, and share the files, also you can display the metadata values or key information about each file. For example, you can view the Created Date, Created By, Modified By, and Modified Date for each file in the document library. You can also create new columns to store the metadata values about the file.

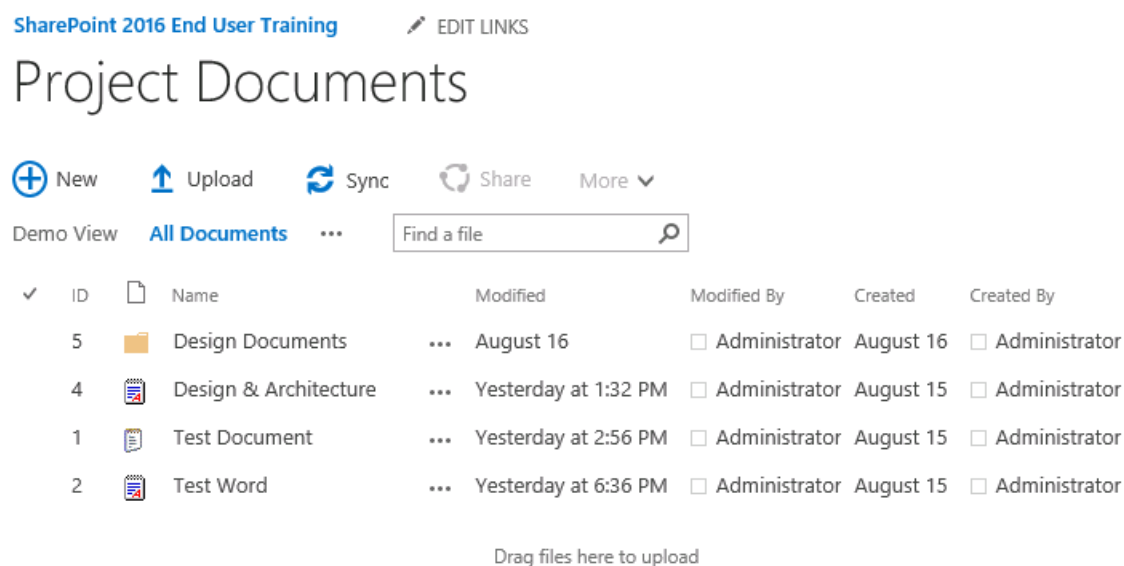


Figure1.1: Document Library

2 Prerequisites

In this section, you will see the prerequisites of managing the document library in SharePoint 2016.

The following are the prerequisites:

1. Make sure that you have a SharePoint 2016 site with appropriate access.
2. Make sure you have administrator or owner access to make changes in the library.

2.1 How to create a Document Library

In this section, you will learn how to create a Document Library in SharePoint 2016.

Create a Document Library:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top-right corner, click **Settings** icon and then click **Site Contents**.

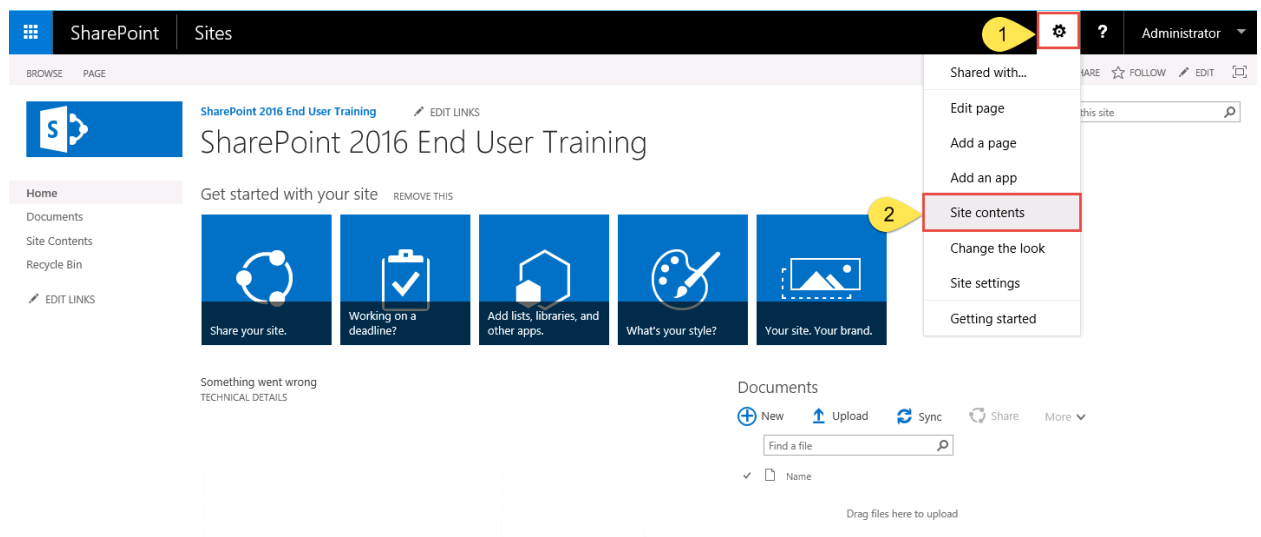


Figure 2.1.1: SharePoint 2016 Site

- In the **Site Contents** page, click **add an app**.

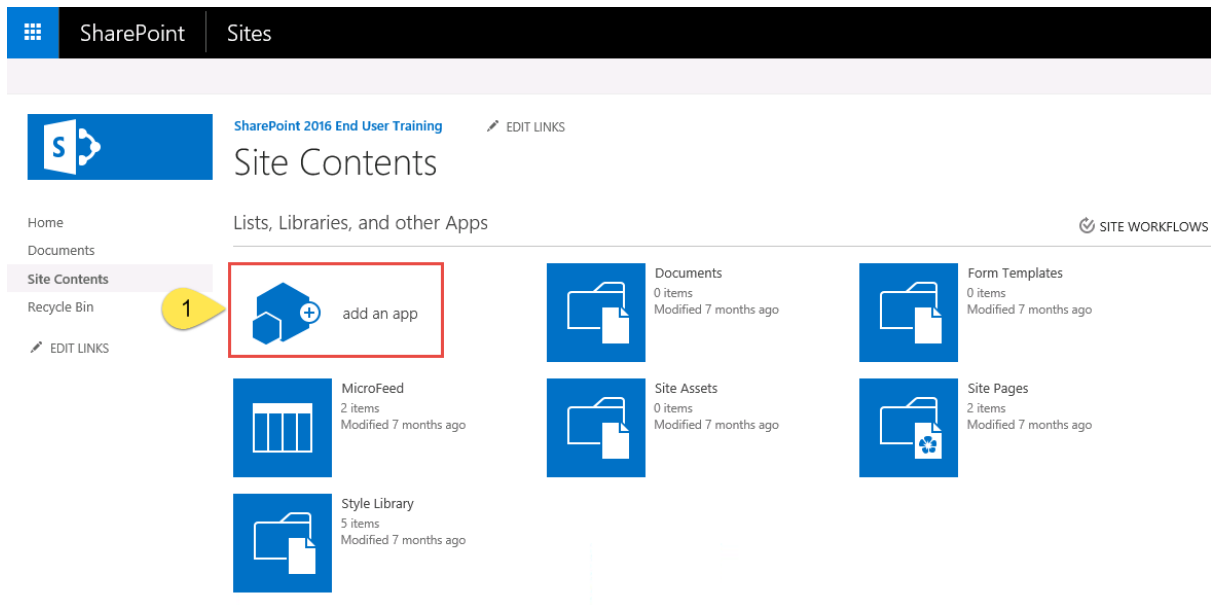


Figure 2.1.2: Site contents page

d) In the **Your Apps** page, click **Document Library** icon/link.

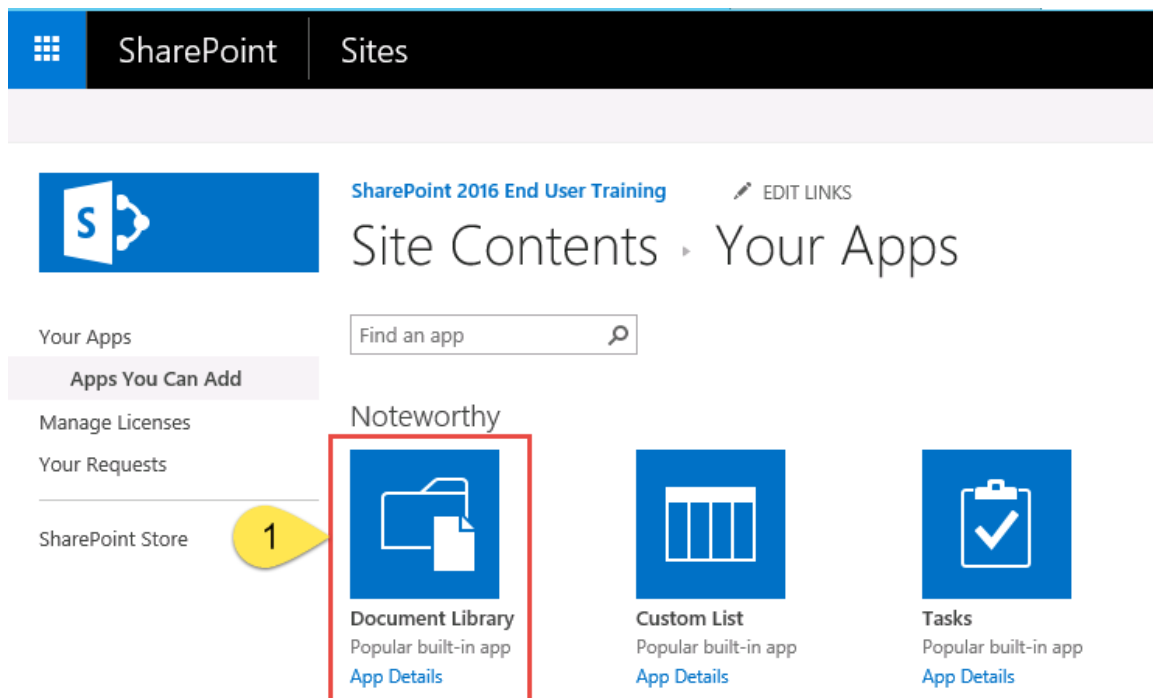


Figure 2.1.3: Your Apps page

- e) In the **Adding Document Library** dialog page, enter the name for new document library and then click **Create** button.

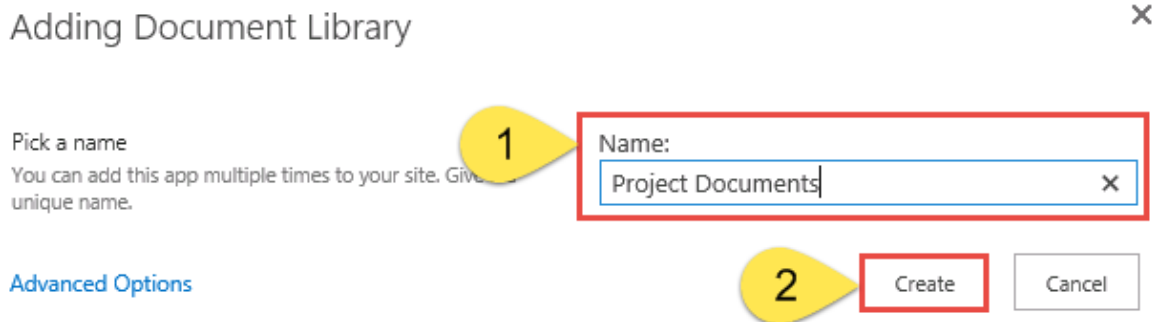


Figure 2.1.4: Adding Document Library

- f) A new document library is created successfully. You can see the new document library on **Site Contents** page as well, in the left navigation.

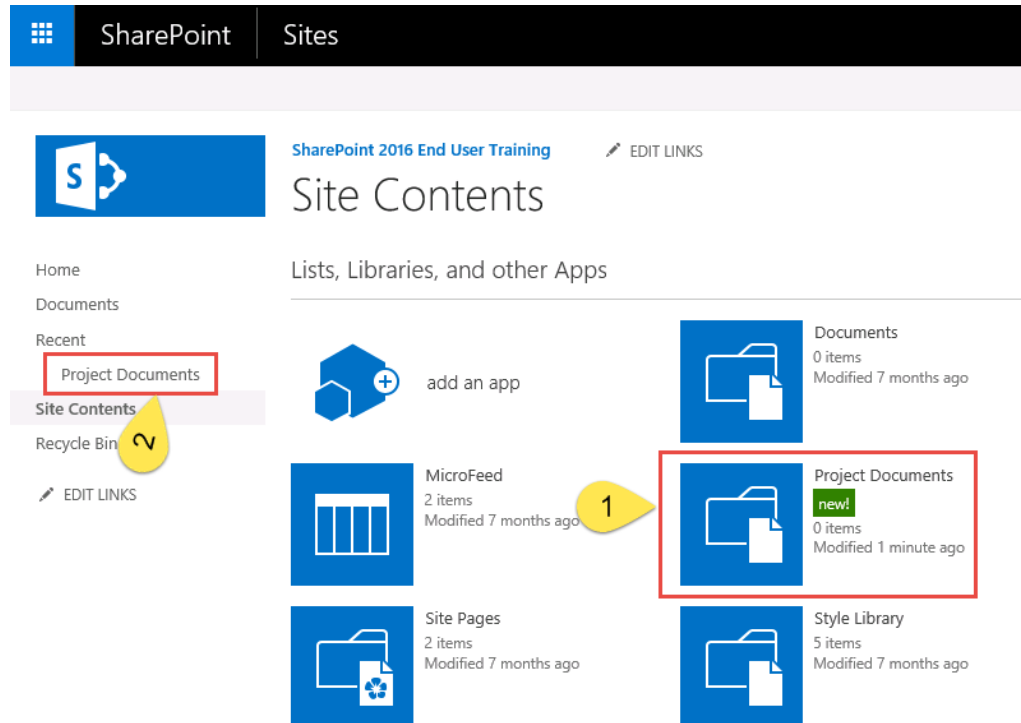


Figure 2.1.5: Site Contents Page

Result

The newly created document library will display the default view. Thus, in this section, you saw how to create a document library in SharePoint 2016.

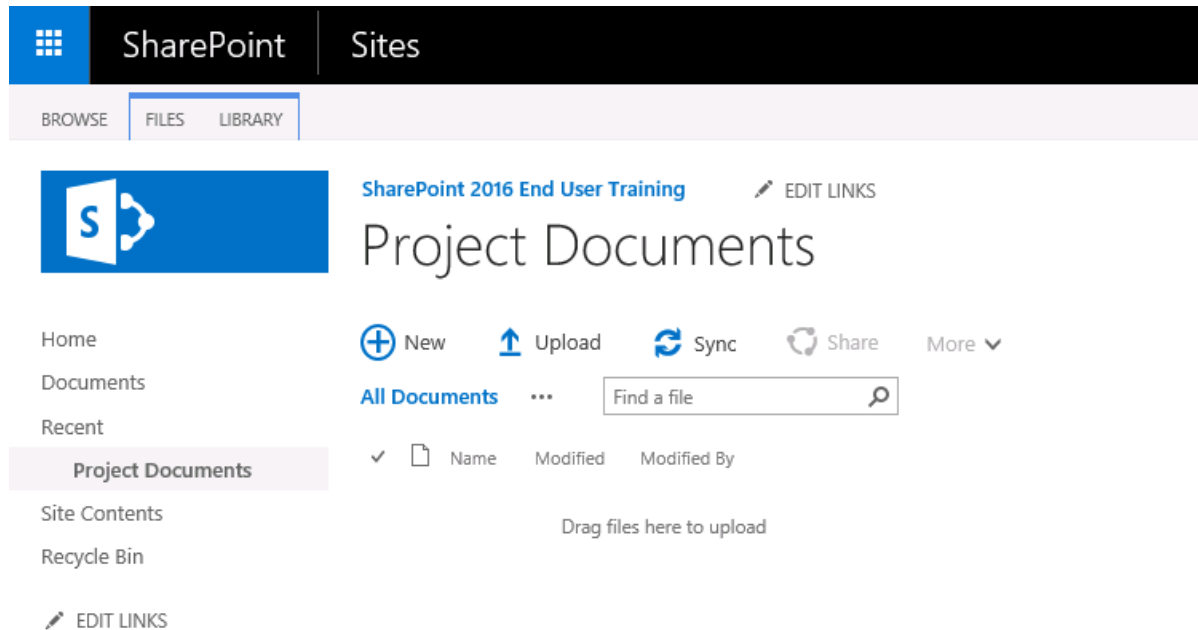


Figure 2.1.6: Newly created document library

2.2 How to upload files to the Document Library

In this section, you will learn how to upload files to the Document Library in SharePoint 2016.

Upload Documents:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top-right corner, click **Settings** icon and then click **Site Contents**.

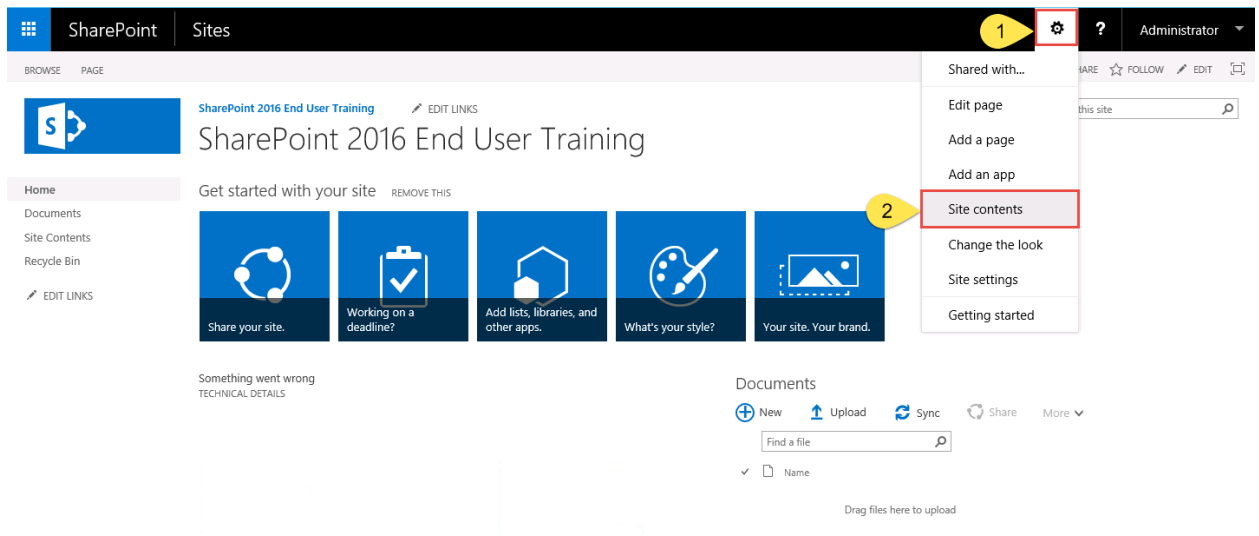


Figure 2.2.1: SharePoint 2016 site

c) Click **Project Documents** library which you have created in the [section 2.1](#).

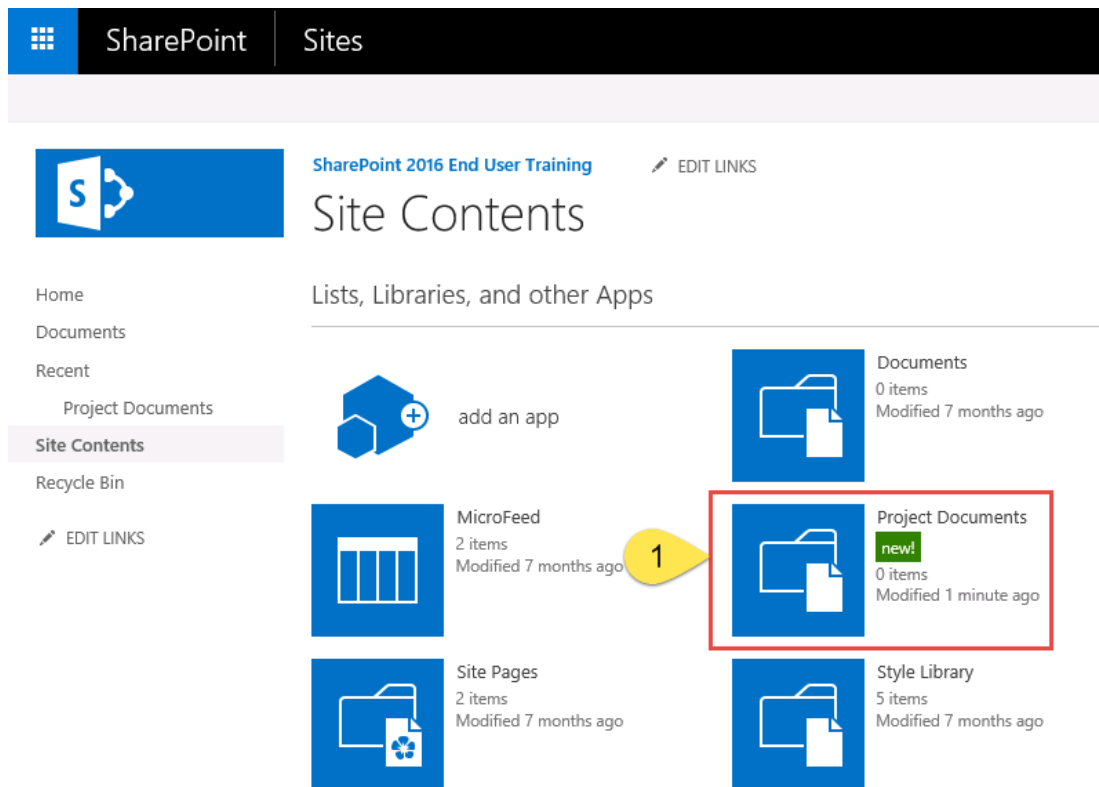


Figure 2.2.2: Site Contents Page

d) Click **Upload** link.

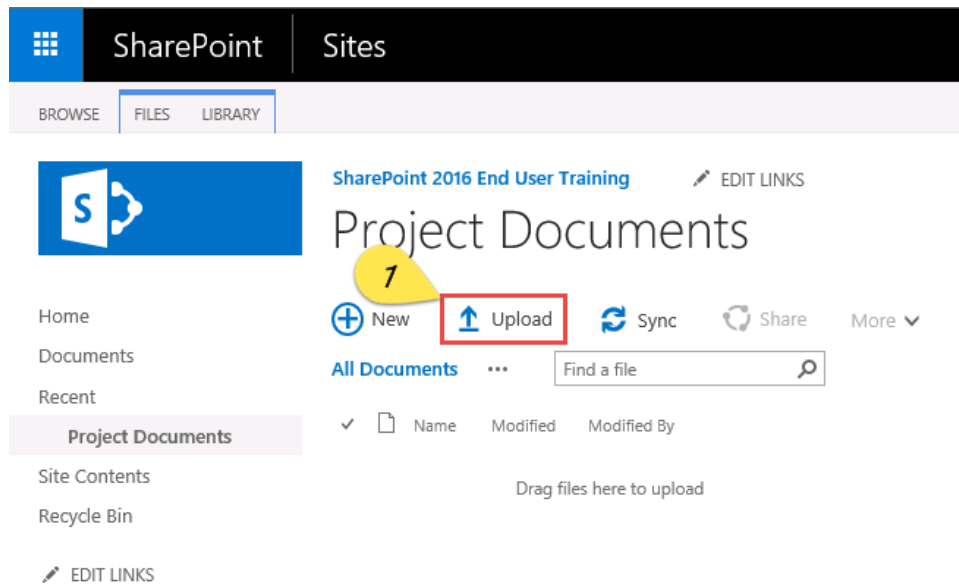


Figure 2.2.3: All Documents Page

e) In the **Add a document** dialog page, click **Browse** button to choose the files.

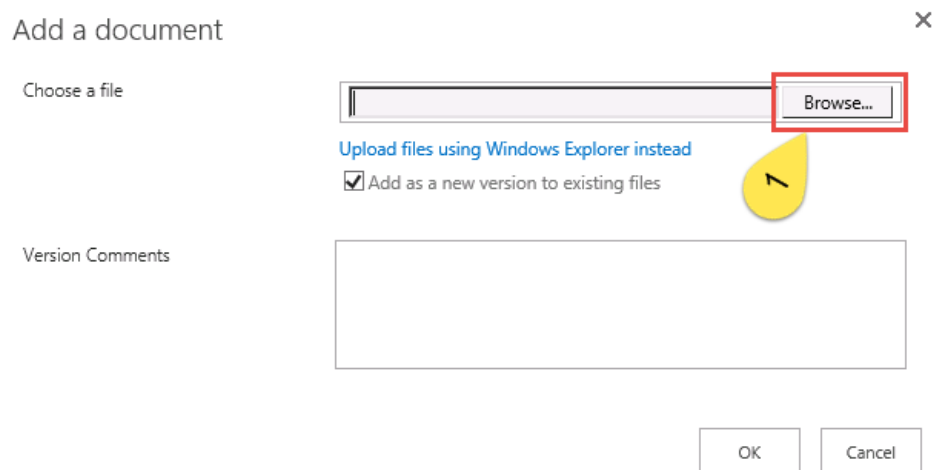


Figure 2.2.4: Add a document dialog page

- f) In the **Choose File to Upload** dialog, choose the files (single or multiple files can be chosen) and then click **Open** button.

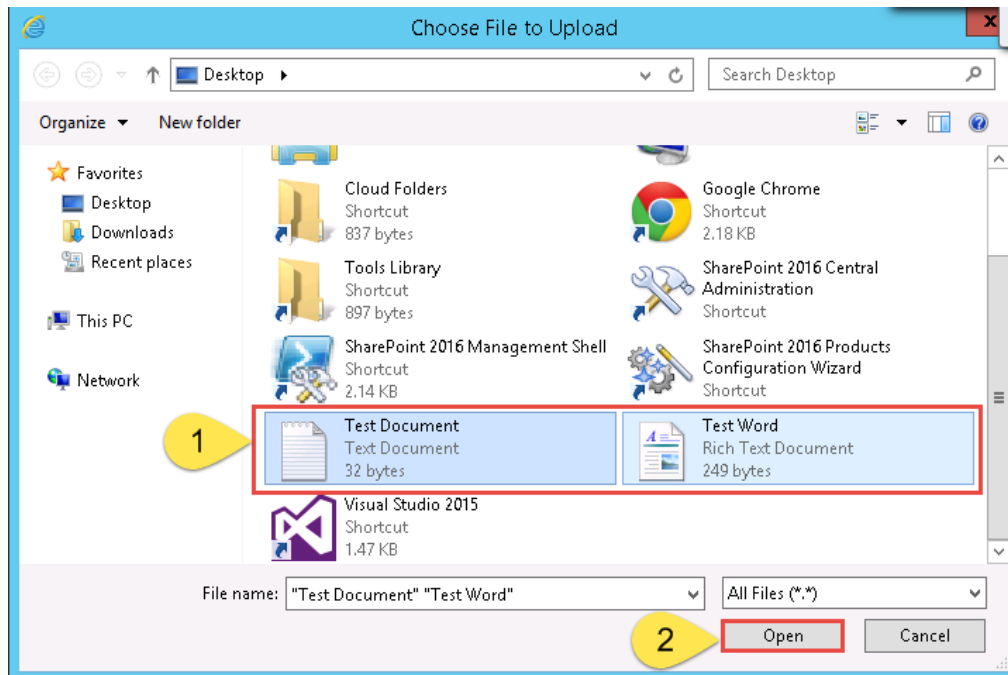


Figure 2.2.5: Choose files

- g) Once you choose the files, click **OK** button.

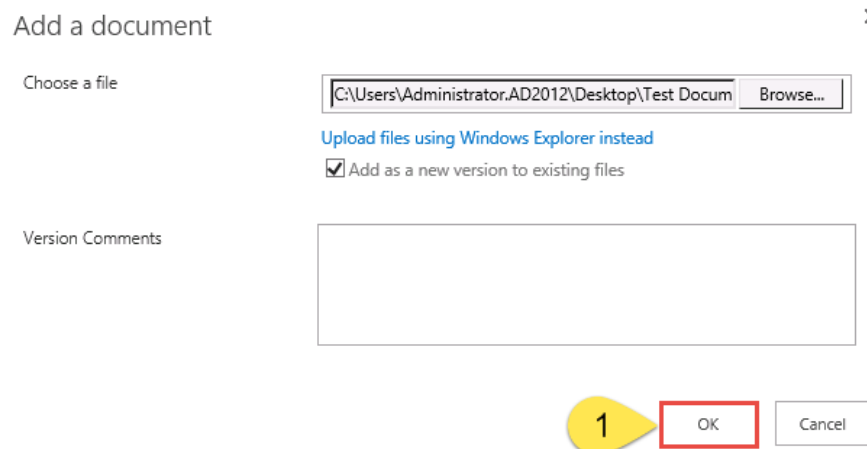


Figure 2.2.6: Add a document dialog page

h) Documents are getting uploaded. You can see the progress as shown in *Fig 2.2.7*.

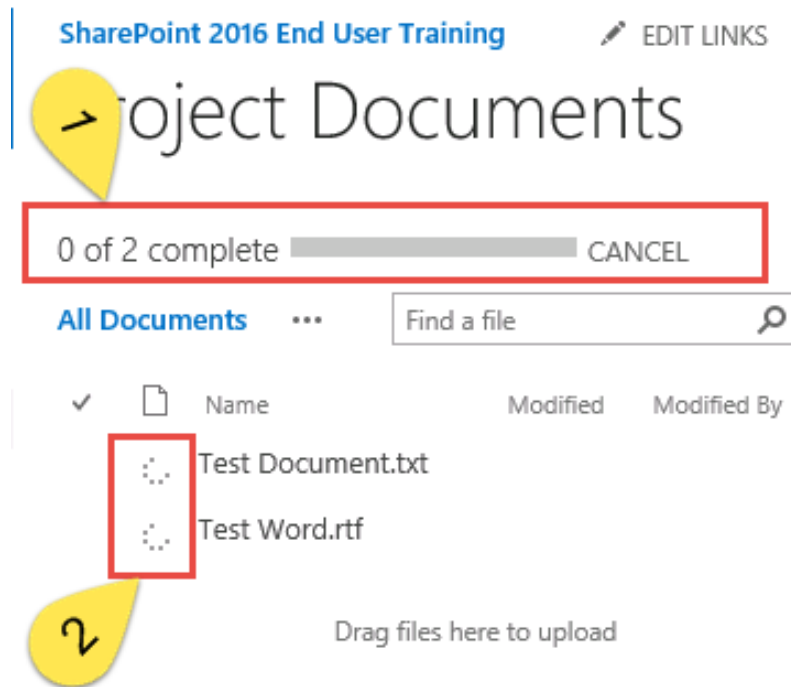


Figure 2.2.7: Uploading documents

Result

Documents are uploaded successfully, as shown in *Fig 2.2.8*. Thus, in this section, you saw how to upload files to the document library in SharePoint 2016.

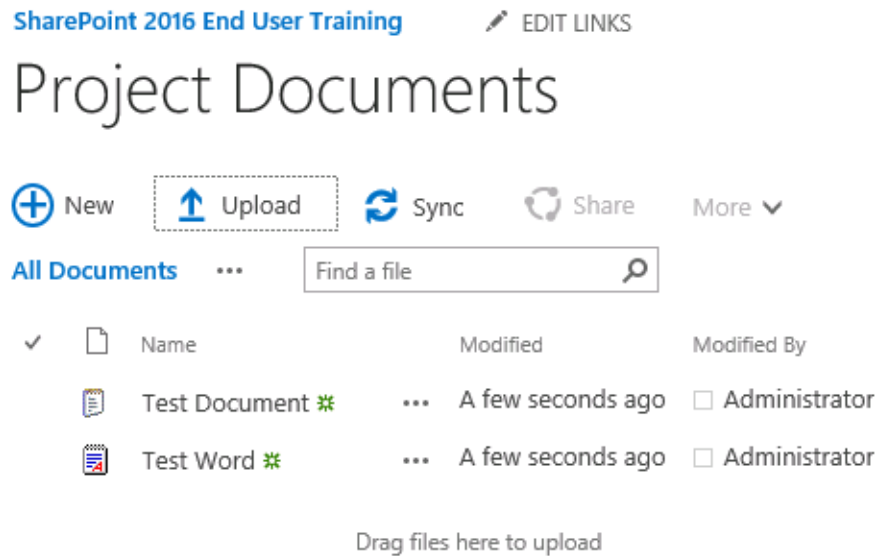


Figure 2.2.8: Documents uploaded

2.3 How to drag and drop the files to the Document Library

In this section, you will learn how to drag and drop files to the Document Library in SharePoint 2016.

Drag and Drop Files:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top-right corner, click **Settings** icon and then click **Site Contents**.

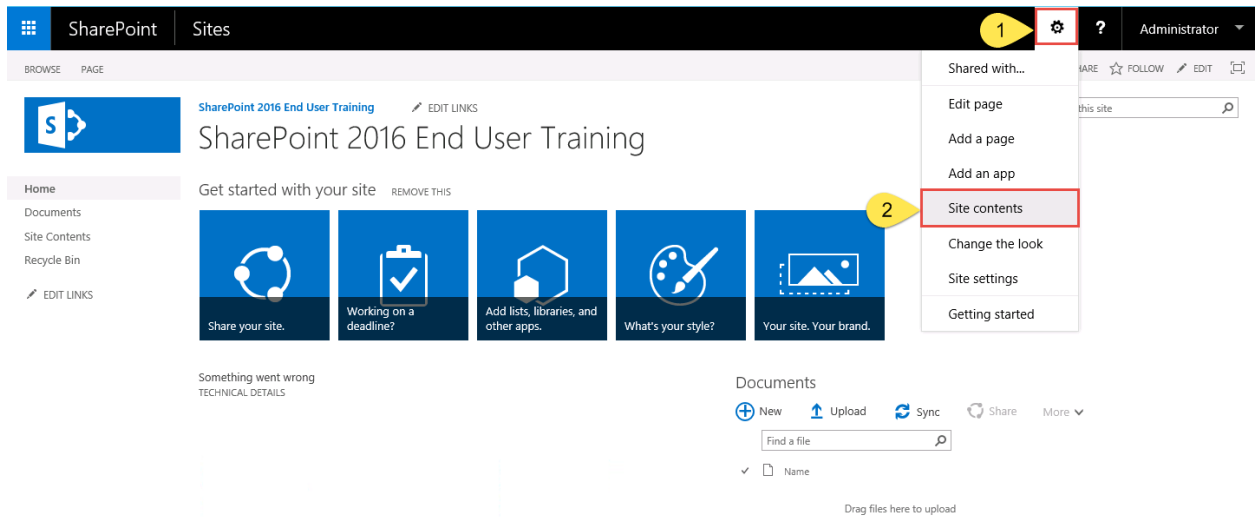


Figure 2.3.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the [section 2.1](#).

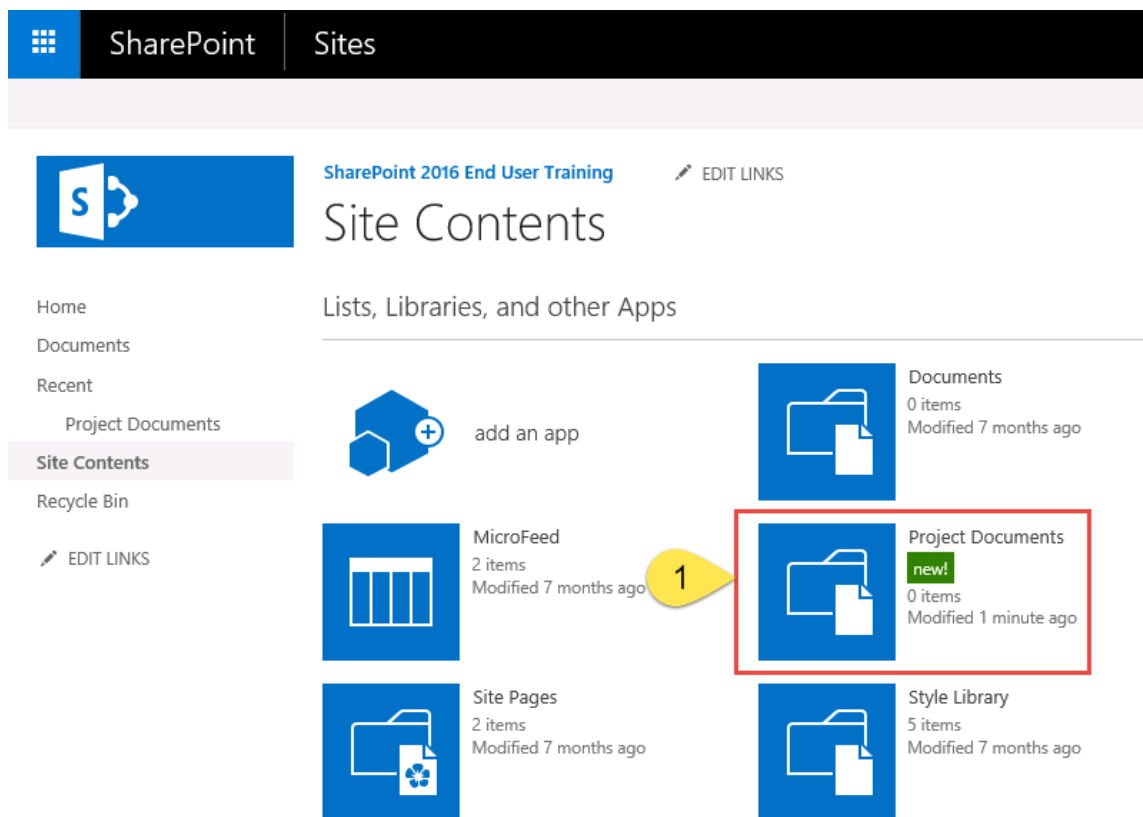


Figure 2.3.2: Site Contents Page

- d) Open the folder in your desktop where you have the files to upload. Select the file that has to be uploaded. Drag the files from the folder and drop them to the document library, as shown in *Fig 2.3.3*.

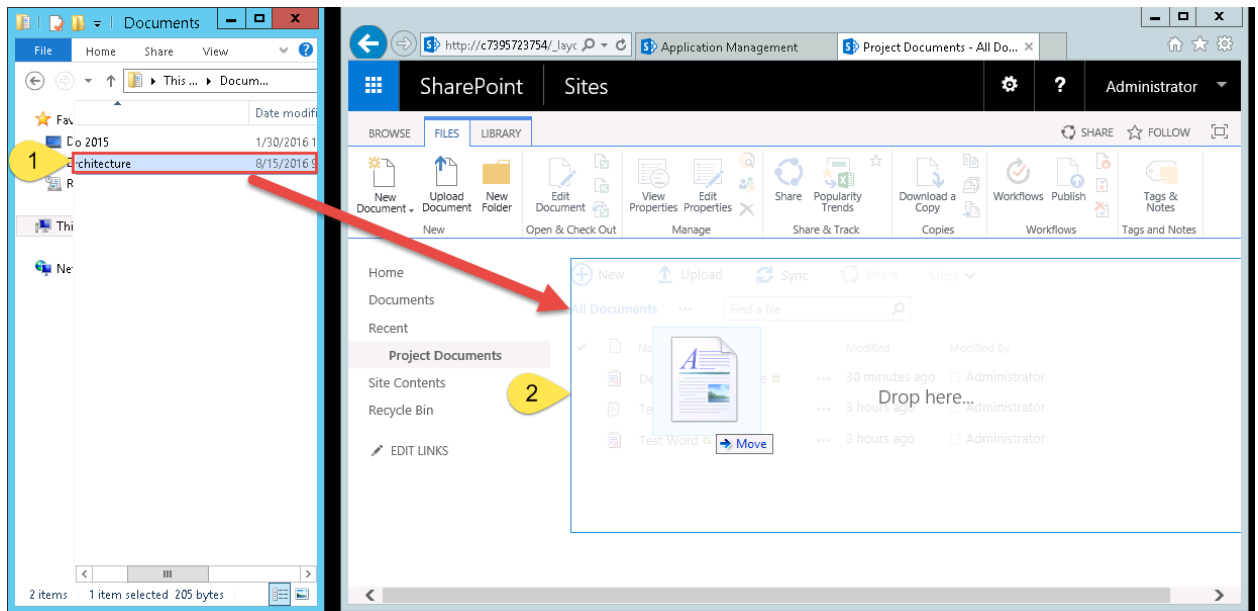


Figure 2.3.3: Drag and Drop Files

Result

Documents are uploaded successfully. Thus, in this section, you saw how to drag and drop the files to the document library in SharePoint 2016.

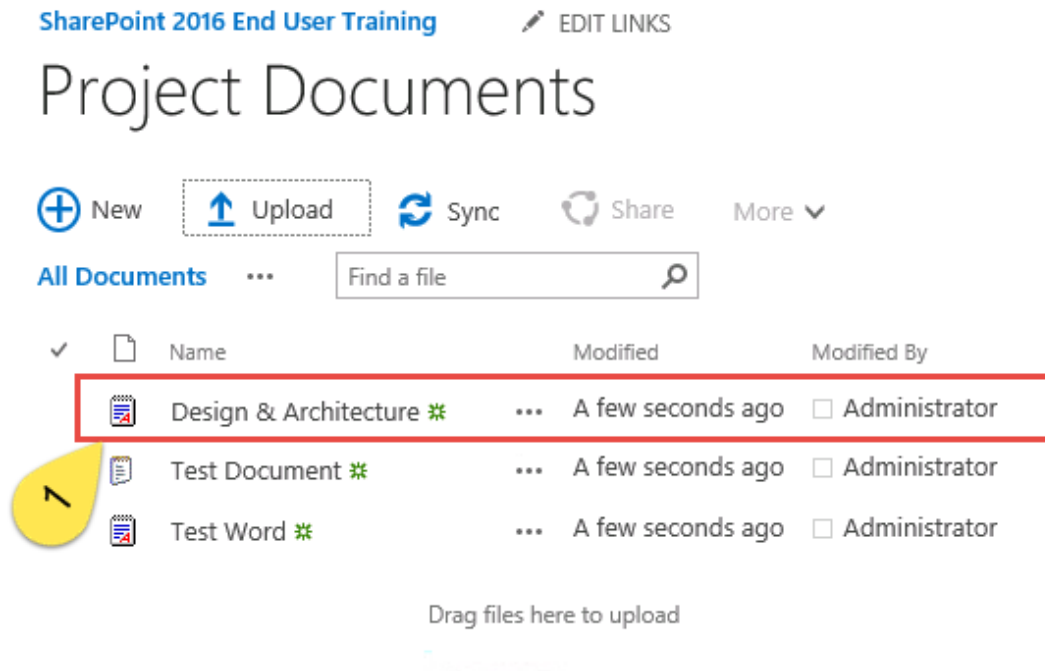


Figure 2.3.4: Files uploaded successfully

2.4 How to Download a File from the Document Library

In this section, you will learn how to download a file from the Document Library in SharePoint 2016.

Download a file:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

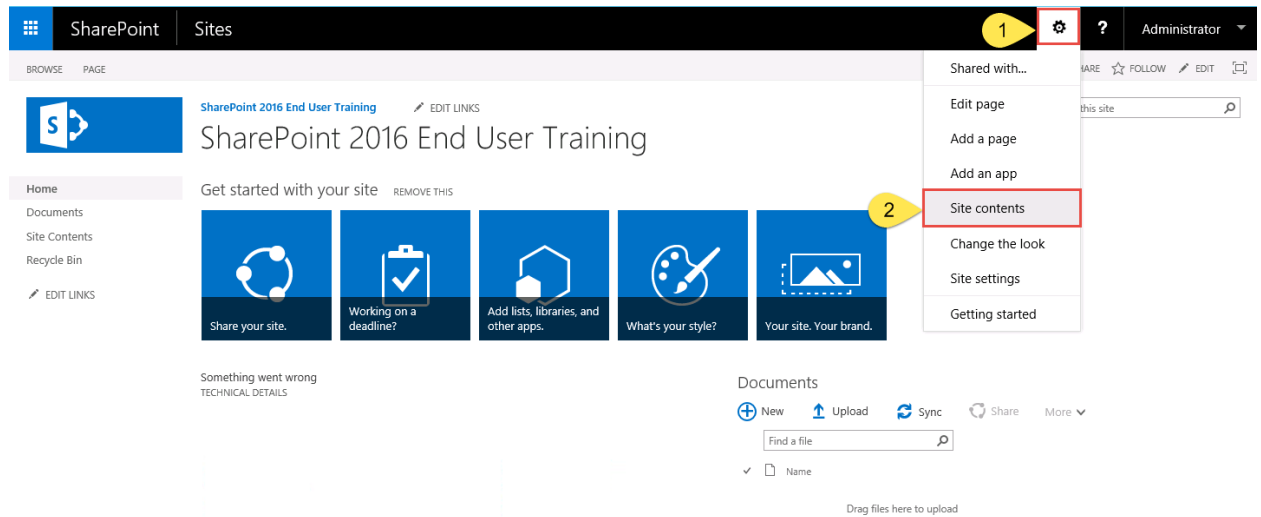


Figure 2.4.1: SharePoint 2016 site

c) Click **Project Documents** library which you have created in the [section 2.1](#).

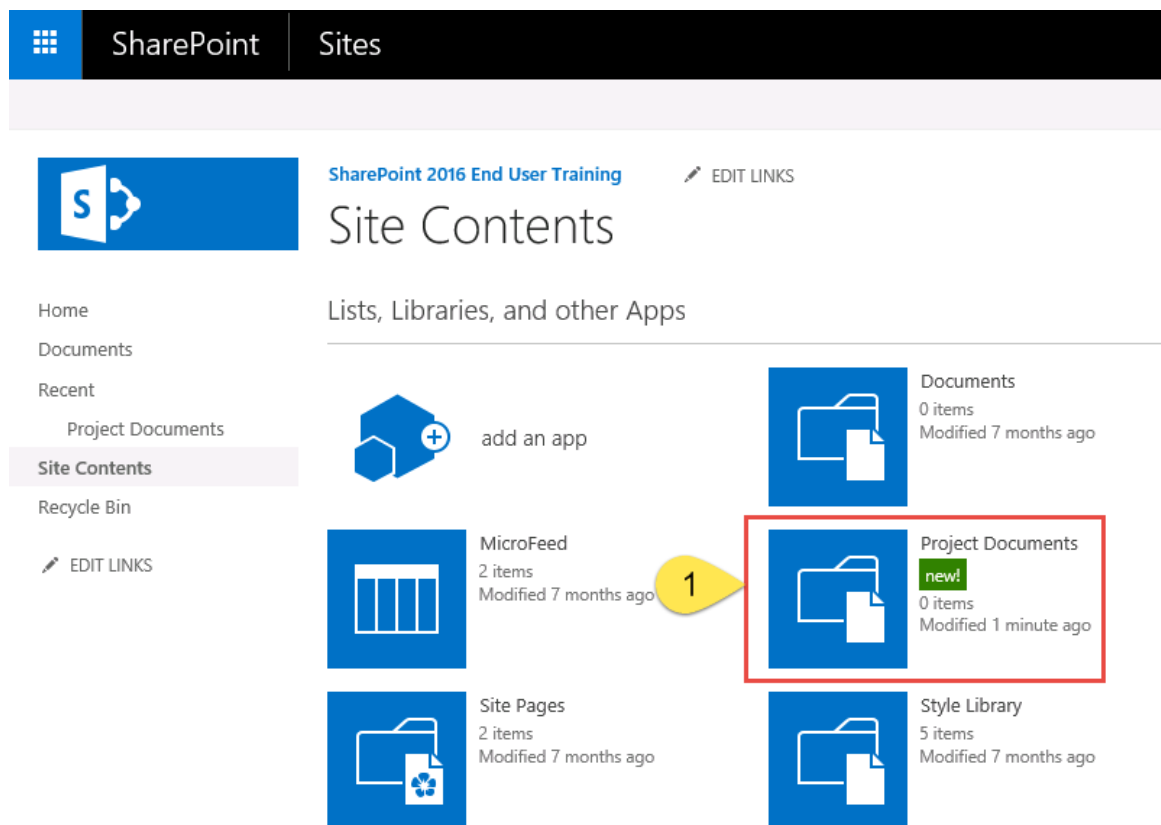


Figure 2.4.2: Site Contents Page

- d) Select the file that you want to download, click **Files** tab in the ribbon interface. Click **Download a copy**.

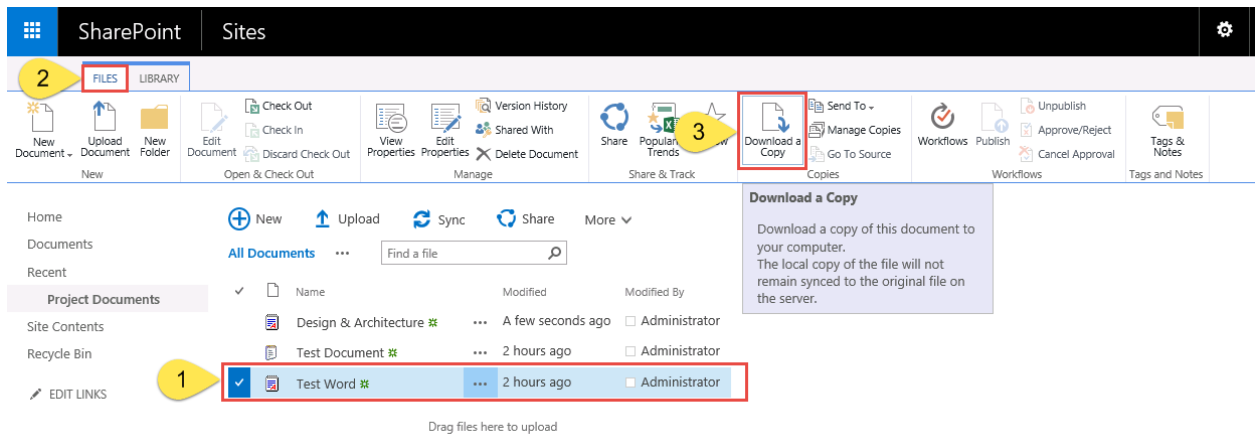


Figure 2.4.3: Download a file

- e) Save the file locally.
- f) **Alternate Option:** Select the file that you want to download, **Open Menu Dialog** for selected item by clicking '...' link next to the document. Go to **More actions** by clicking '...' link.

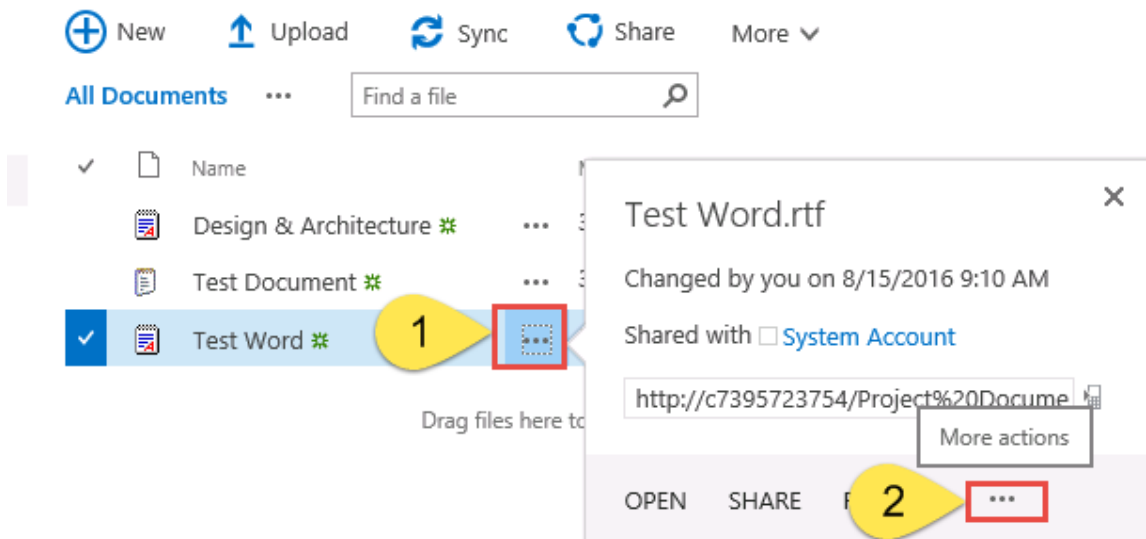


Figure 2.4.4: Download a file

g) Click **Download** link and save the file locally.

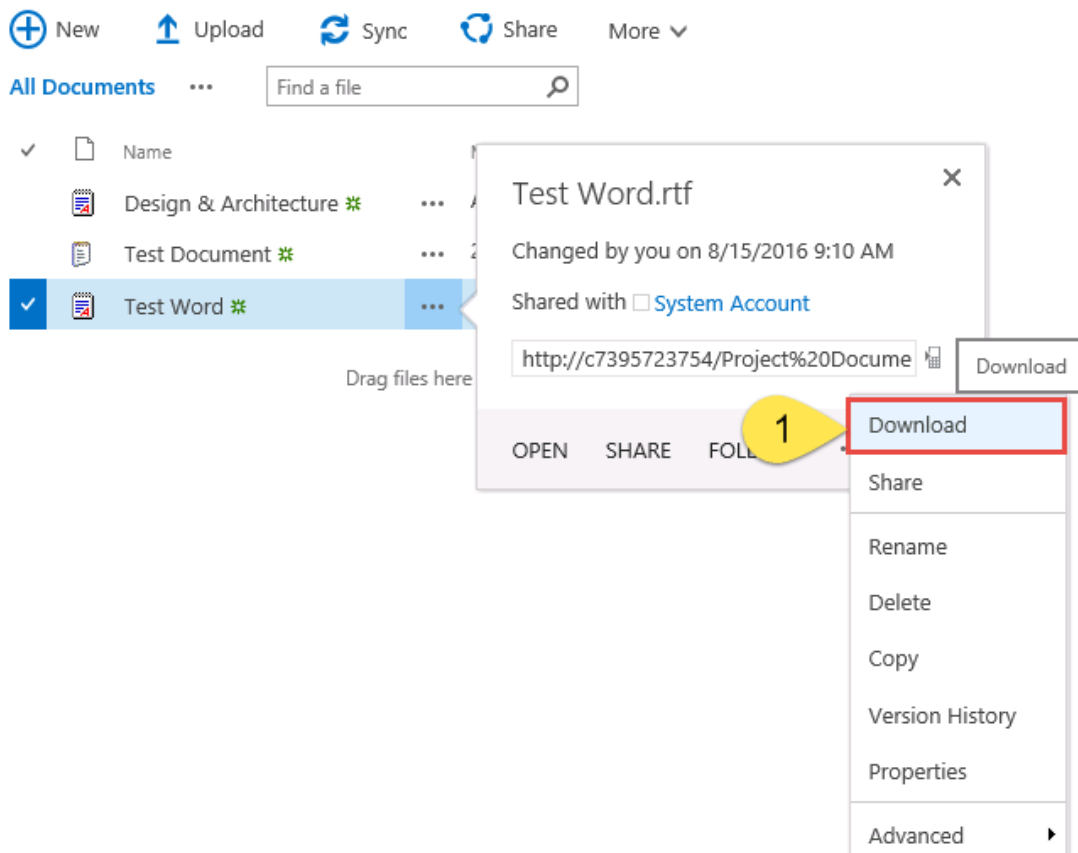


Figure 2.4.5: Download a file

Result

Thus, in this section, you saw how to download a file from the document library in SharePoint 2016.

2.5 How to create a folder in the Document Library

In this section, you will learn how to create a folder in SharePoint 2016 Document Library.

Create Folder:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top-right corner, click **Settings** icon and then click **Site Contents**.

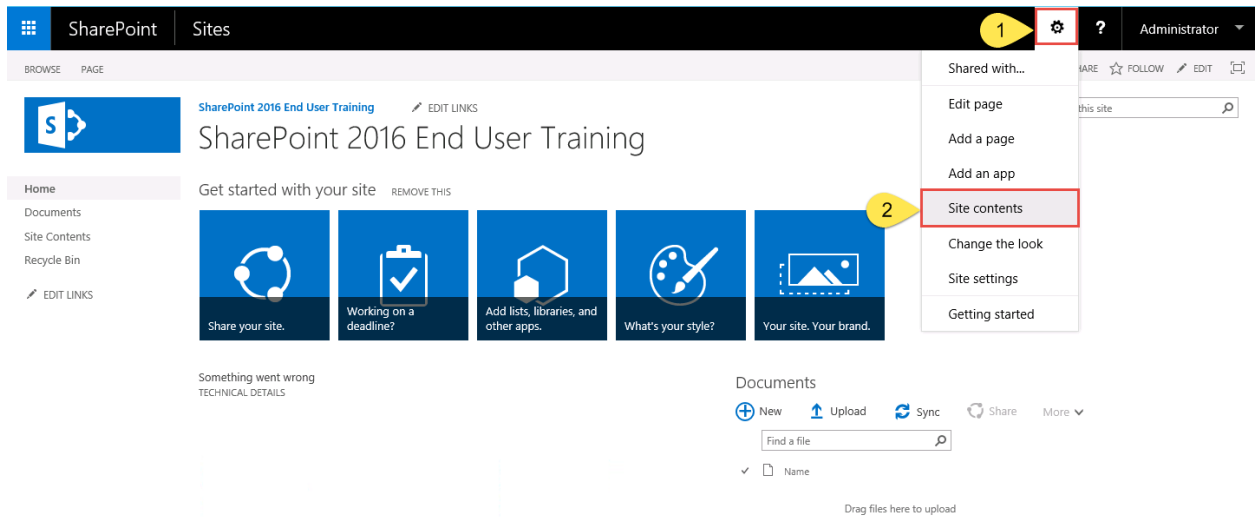


Figure 2.5.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the [section 2.1](#).

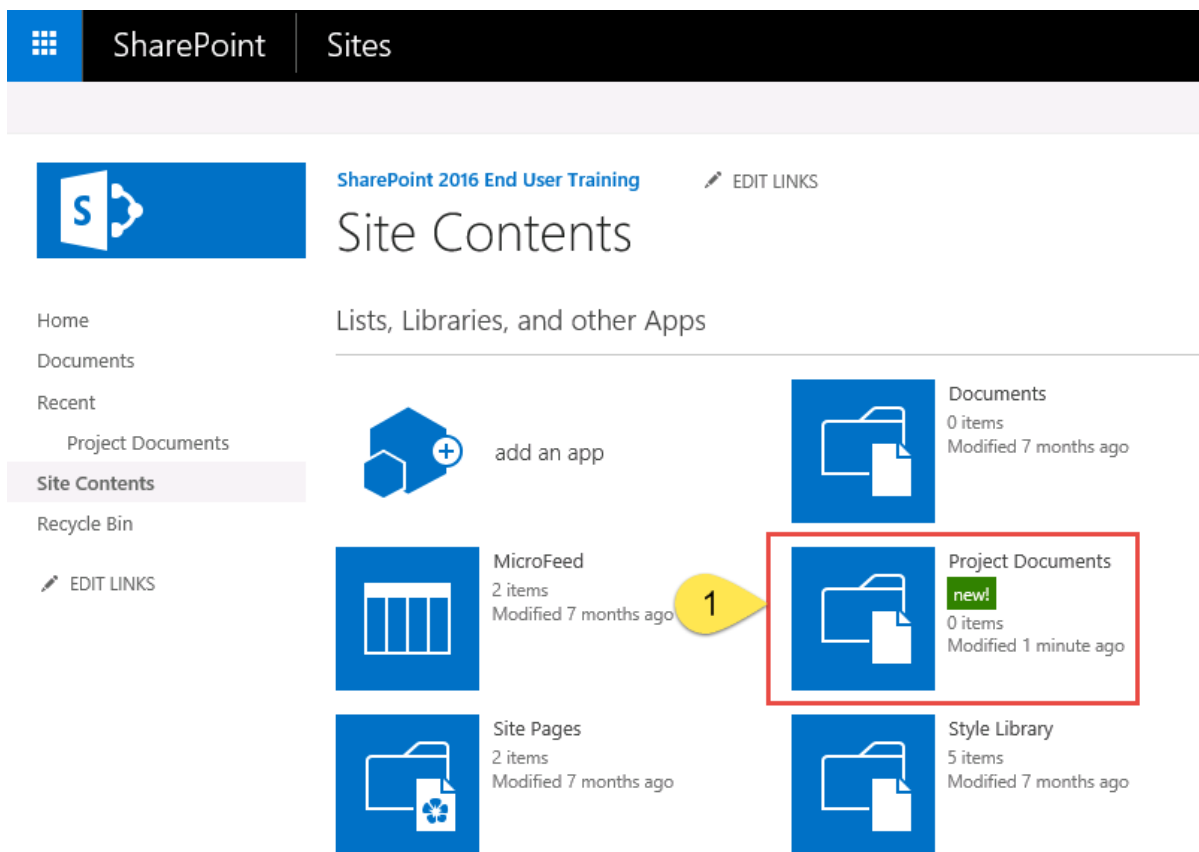


Figure 2.5.2: Site Contents Page

d) In the ribbon interface, click **Files** tab and then click **New Folder** button.

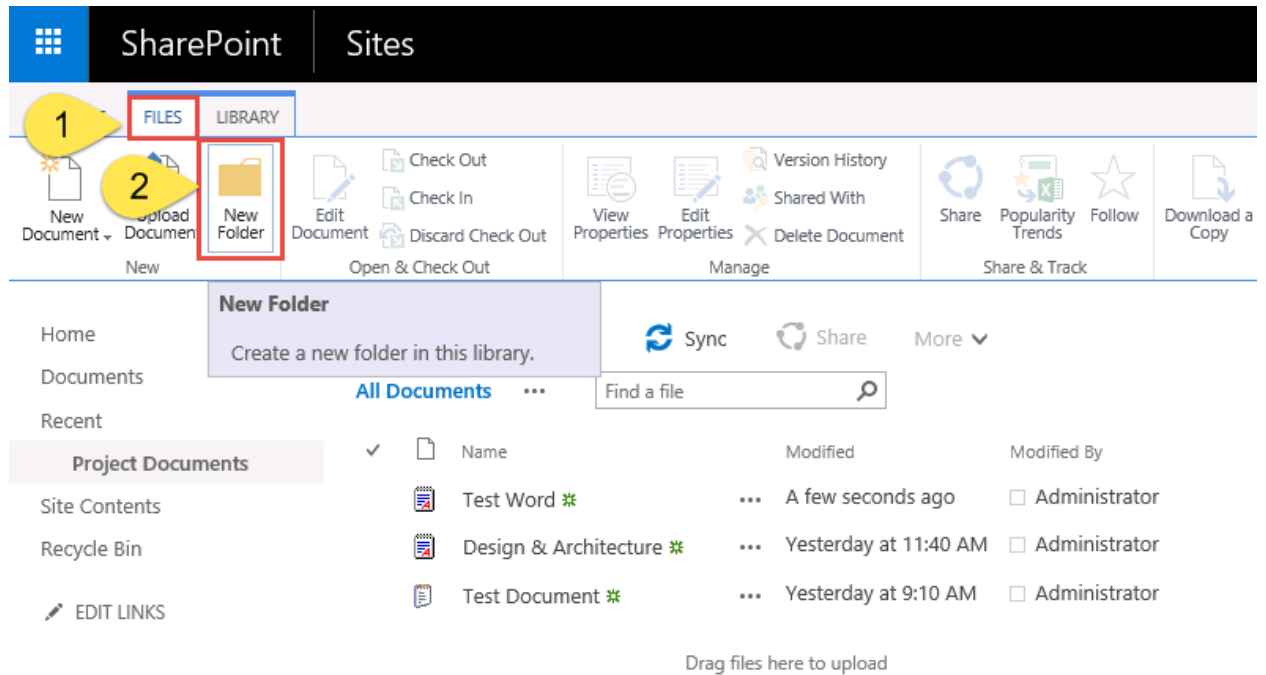


Figure 2.5.3: Ribbon Interface

e) Enter the name for the folder and then click **Create** button.

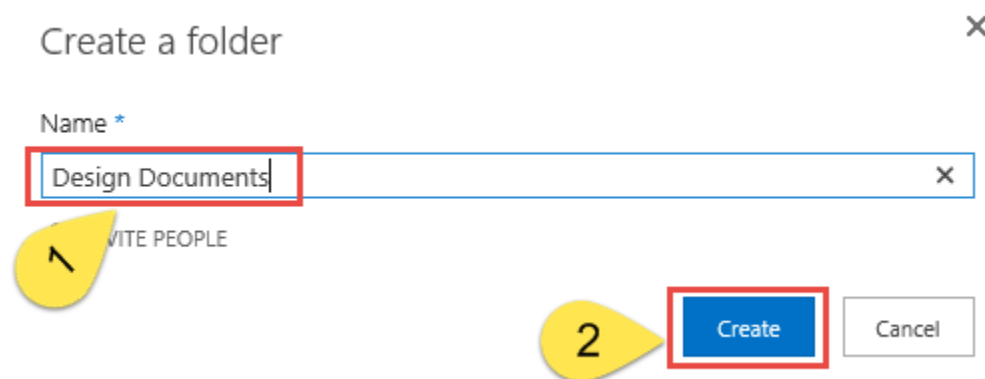


Figure 2.5.4: Create a folder

Result

You can see the newly created folder in the document Library. Thus, in this section, you saw how to create a folder in SharePoint 2016 Document Library.

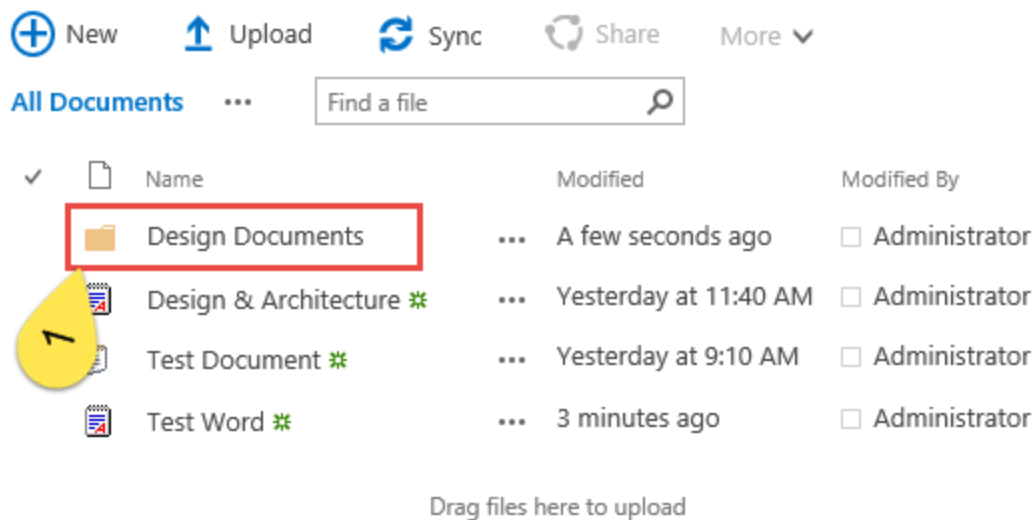


Figure 2.5.5: Folder Created Successfully

Note:

Make sure, folder creation is enabled for this Document Library. Navigate to **Library Settings** => **General Settings** => **Advanced Settings** => **Folders** section.

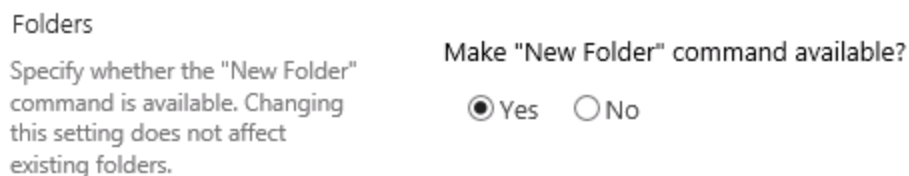


Figure 2.5.6: Advanced Settings

2.6 How to delete a file or folder in the Document Library

In this section, you will learn how to delete a file or folder in SharePoint 2016 Document Library.

Delete a file or folder:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top-right corner, click **Settings** icon, and then click **Site Contents**.

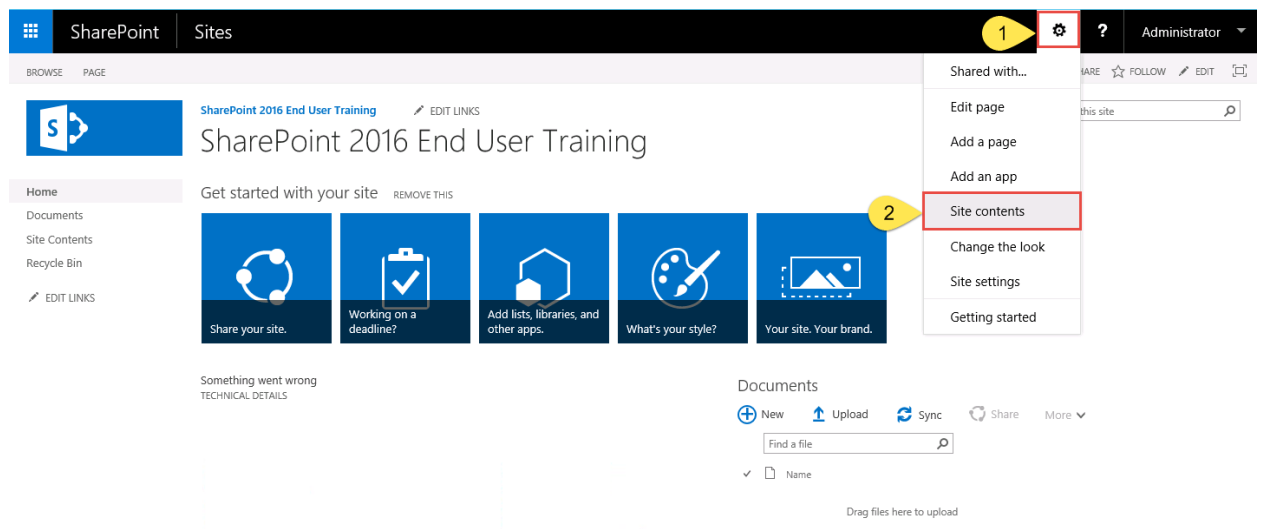


Figure 2.6.1: SharePoint 2016 Site

- Click **Project Documents** library which you have created in the [section 2.1](#).

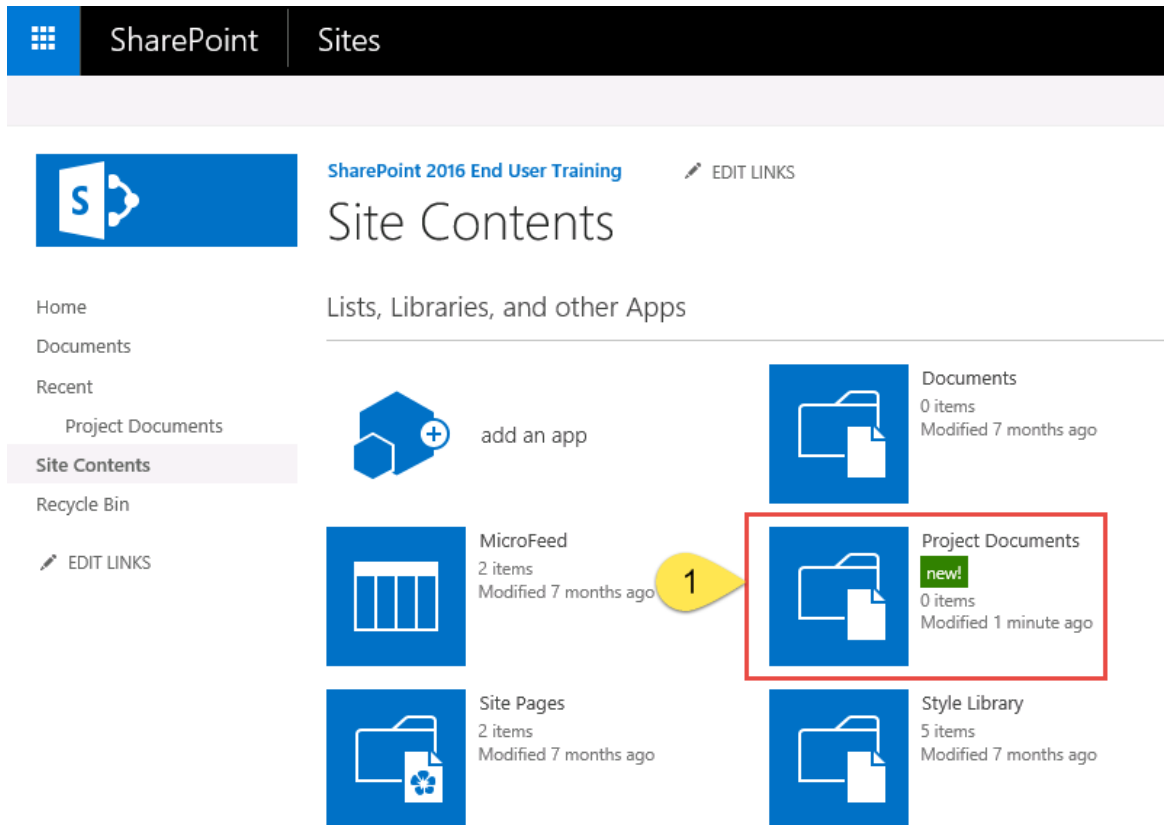


Figure 2.6.2: Site Contents Page

- d) Select the file or folder that you want to delete. Click **Files** tab in the ribbon interface. In the **Manage** section, click **Delete Document**.

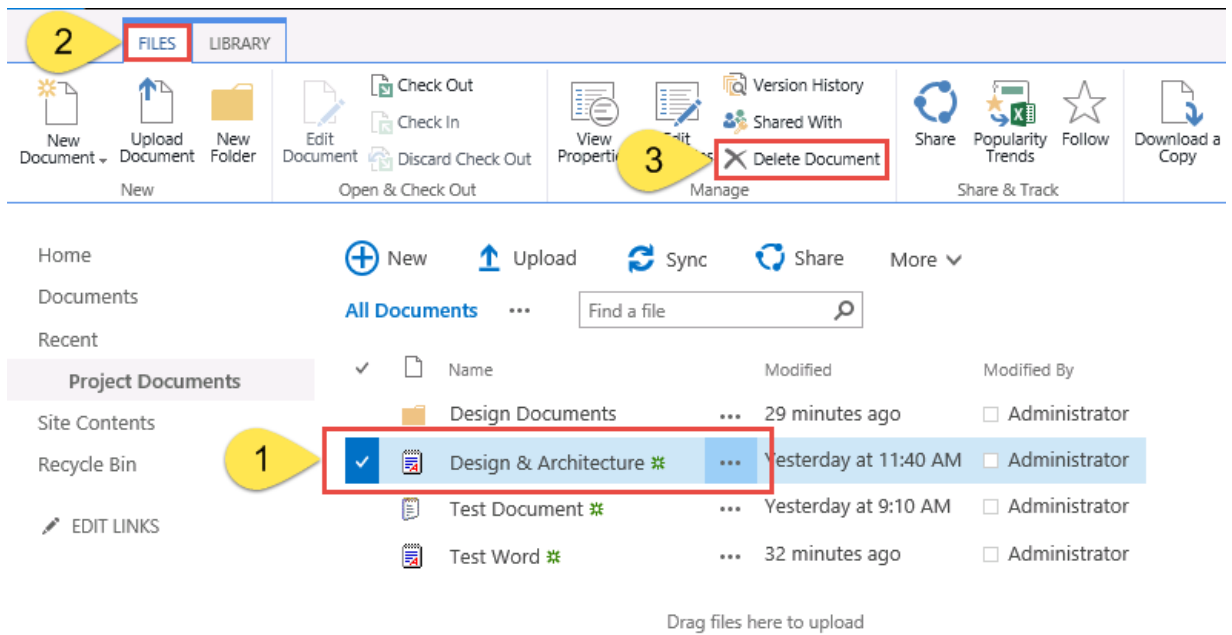


Figure 2.6.3: Delete Document

- e) **Alternate Option:** Select the file or folder that you want to delete. Open **Menu** Dialog for selected item by clicking ‘...’ link next to the document. Go to **More actions** by clicking ‘...’ link.

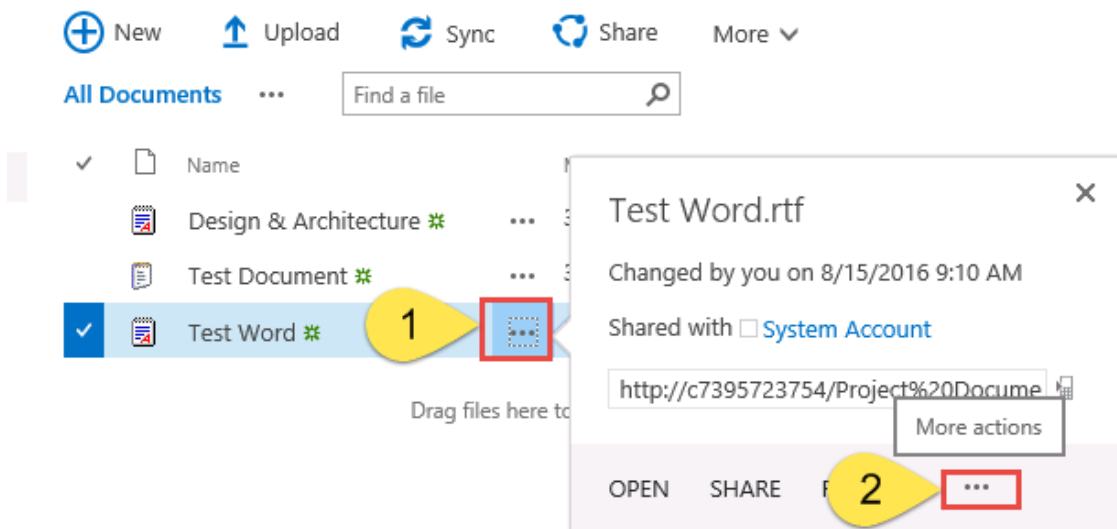


Figure 2.6.4: More Actions

f) Click **Delete** link.

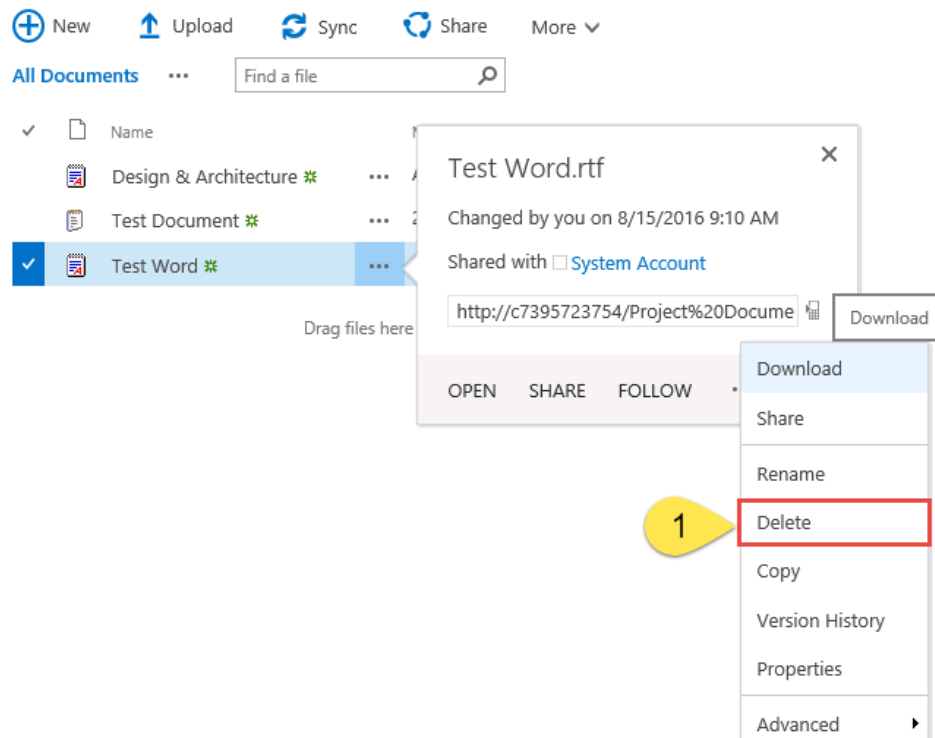


Figure 2.6.5: Delete Document

g) Make sure, you want to send the items to the site Recycle Bin by clicking **OK** button.

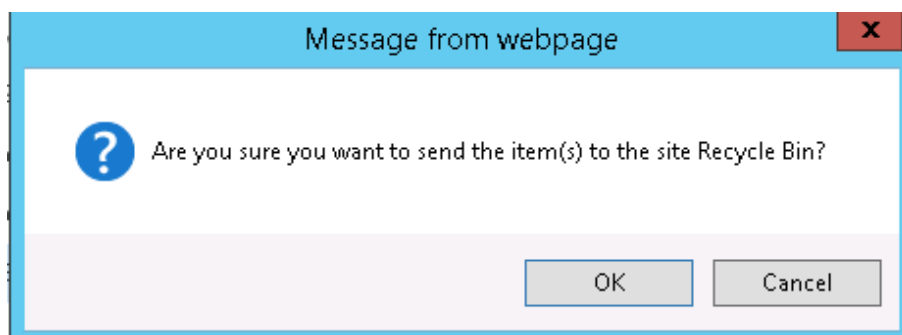


Figure 2.6.5: Pop-up message

Result

Thus, in this section, you saw how to delete a file or folder in SharePoint 2016 Document Library.

2.7 How to View/Edit the Properties in the Document Library

In this section, you will learn how to view or edit the properties of the selected document in SharePoint 2016 Document Library.

View or Edit the Properties:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon, and then click **Site Contents**.

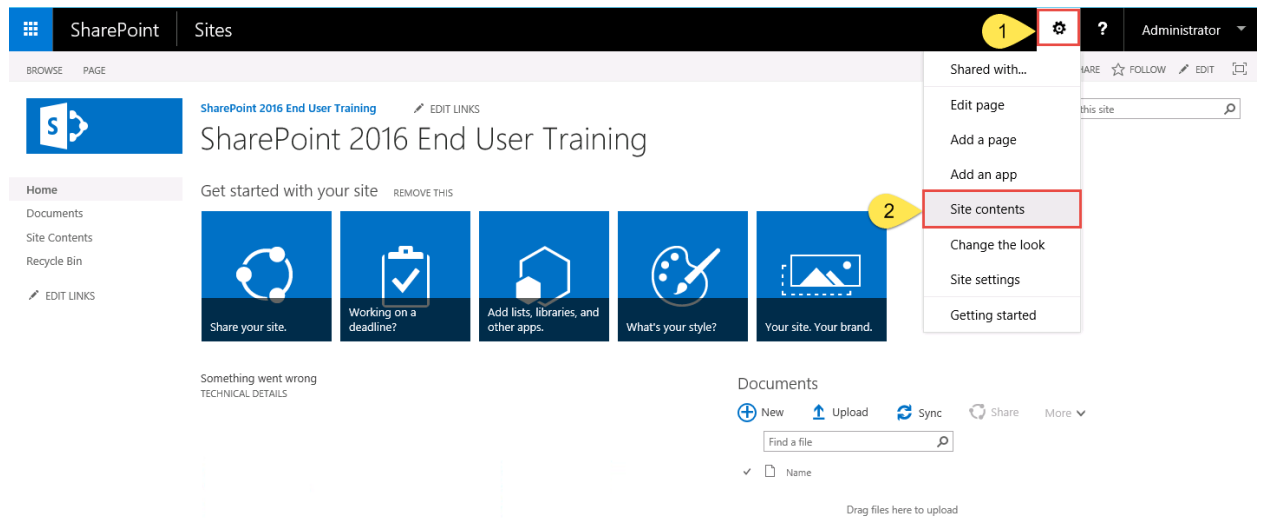


Figure 2.7.1: SharePoint 2016 Site

- Click **Project Documents** library which you have created in the section 2.1.

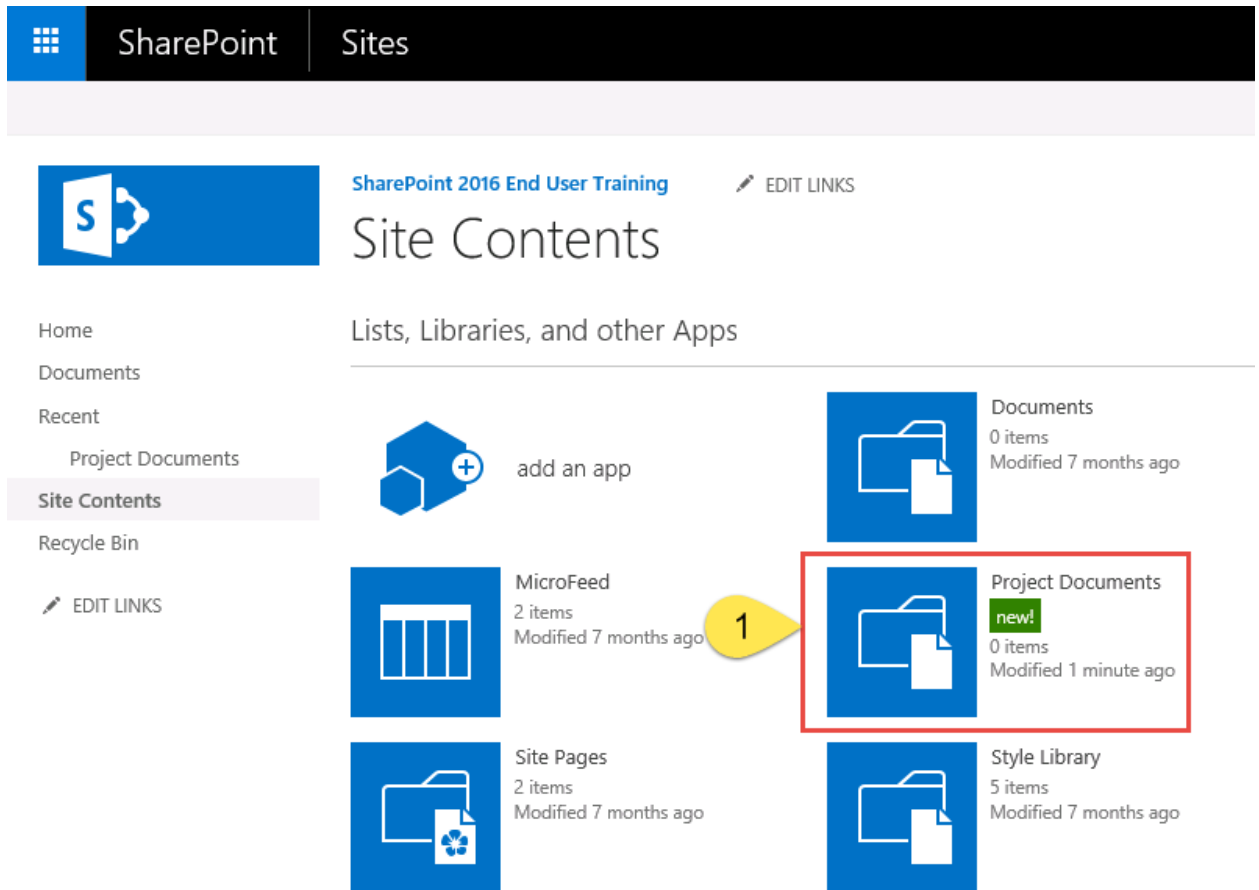


Figure 2.7.2: Site Contents Page

- d) **View Properties:** Select the document for which you want to view the properties. Click **Files** tab in the ribbon interface. Click **View Properties** button. You can view all the properties as shown in *Fig 2.7.3*.

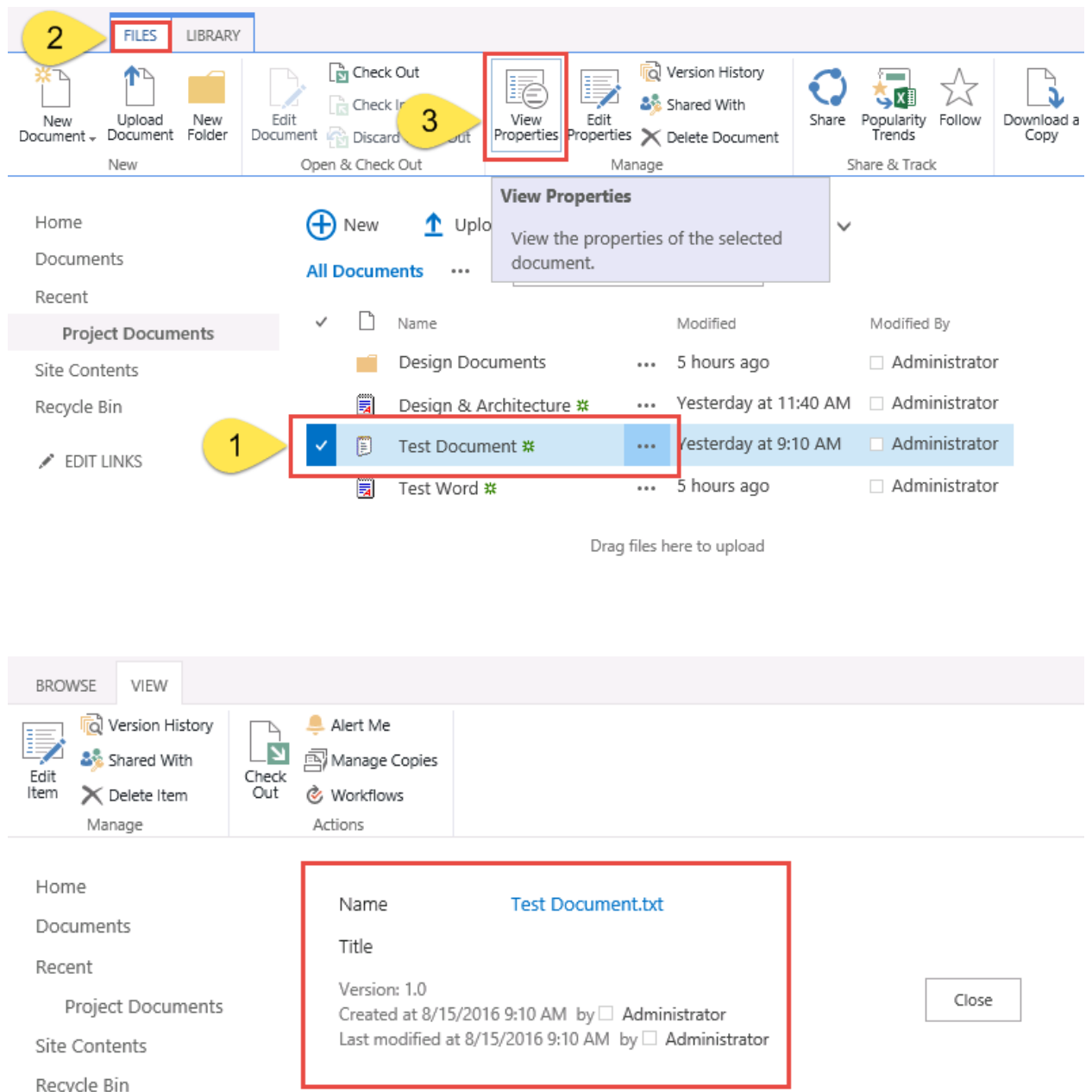


Figure 2.7.3: View Properties

- e) **Edit Properties:** Select the document for which you want to edit the properties. Click **Files** tab in the ribbon interface. Click **Edit Properties** button. You can view all the properties as shown in *Fig 2.7.4*.

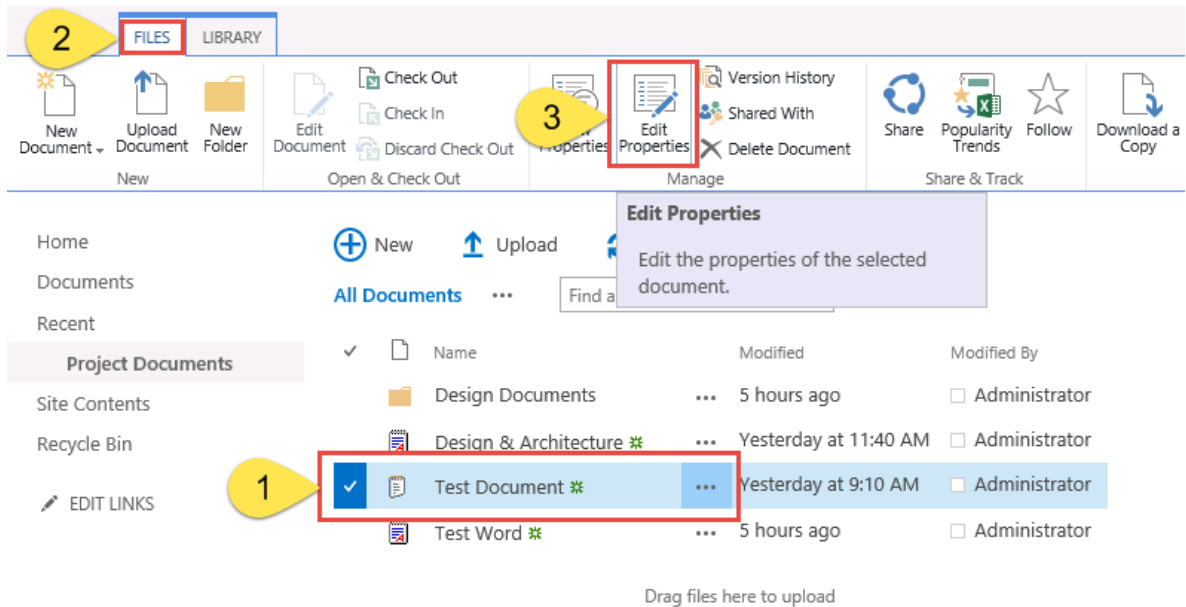


Figure 2.7.5: Edit Properties

f) Edit the document properties and click **Save** button.

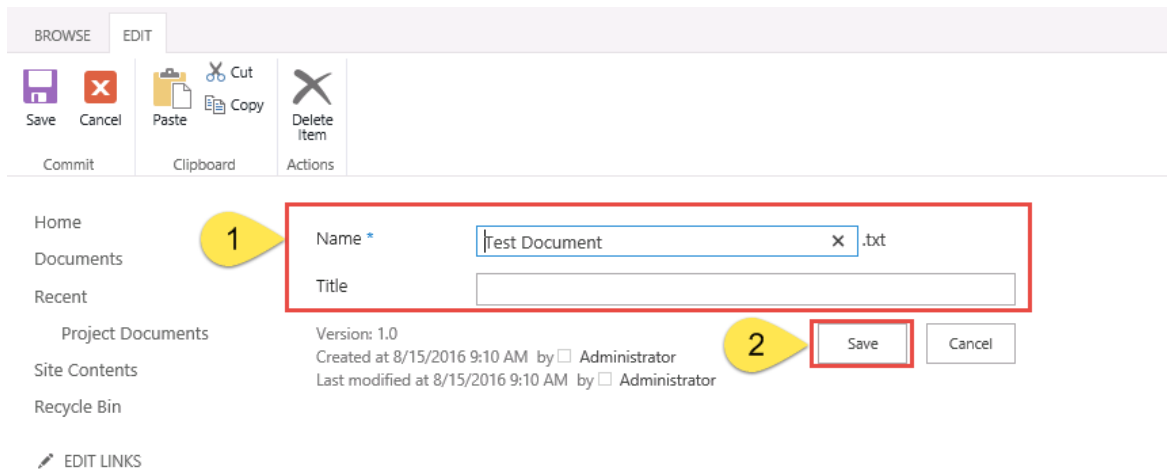


Figure 2.7.6: Edit Properties

g) **Alternate Option:** Select the document for which you want to edit the properties. Open **Menu** Dialog for selected item by clicking ‘...’ link next to the document. Go to **More actions** by clicking ‘...’ link.

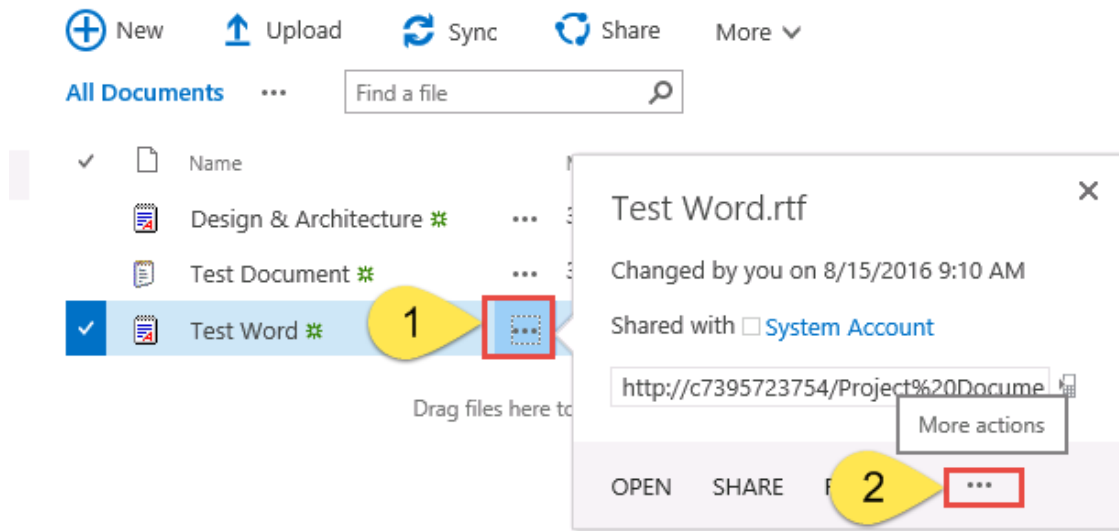


Figure 2.7.7: More Actions

h) Click **Properties** link.

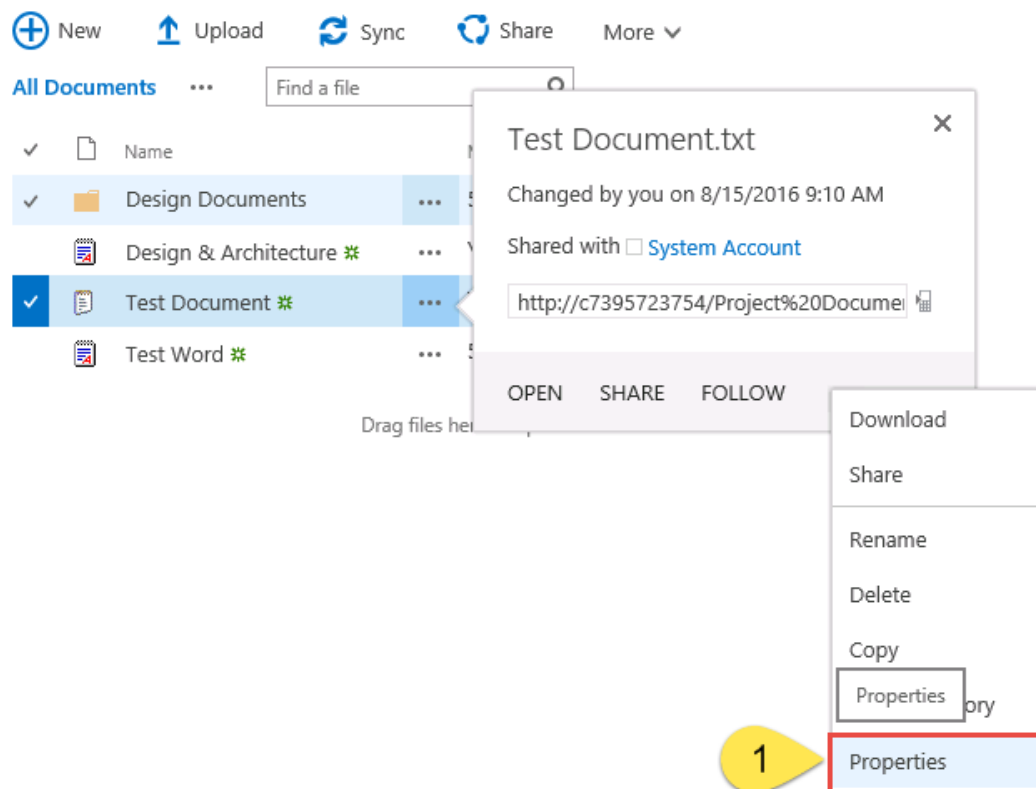


Figure 2.7.8: Properties

- i) Edit the document properties and click **Save** button.

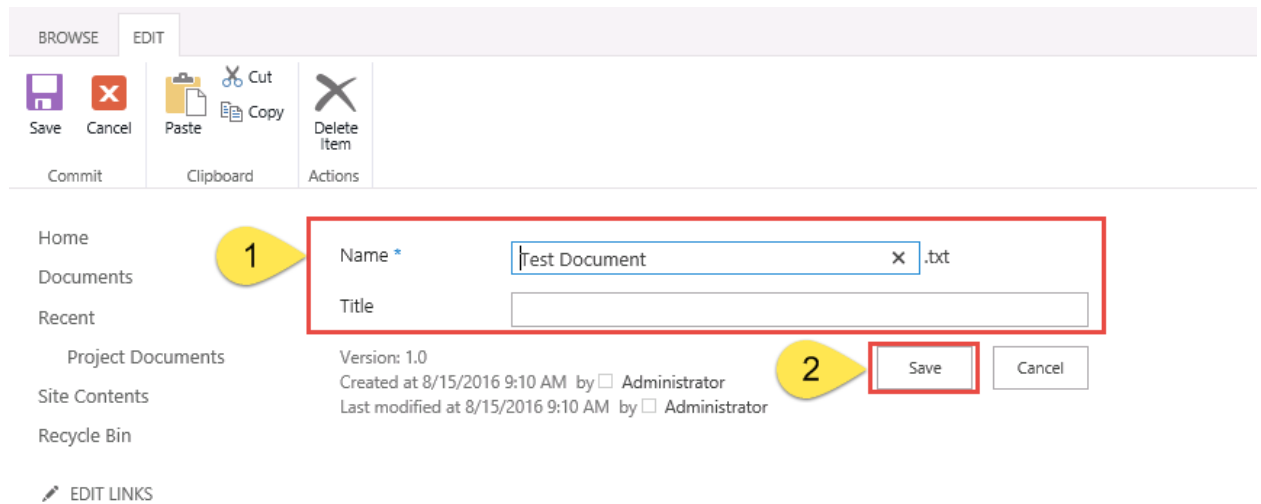


Figure 2.7.9: Edit Properties

Result

Thus, in this section, you saw how to view or edit the properties of the selected document in SharePoint 2016 Document Library.

2.8 How to enable versioning in the Document Library

In this section, you will learn how to enable versioning in SharePoint 2016 Document Library.

View or Edit the Properties:

- a) Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- b) In the top right corner, click **Settings** icon and then click **Site Contents**.

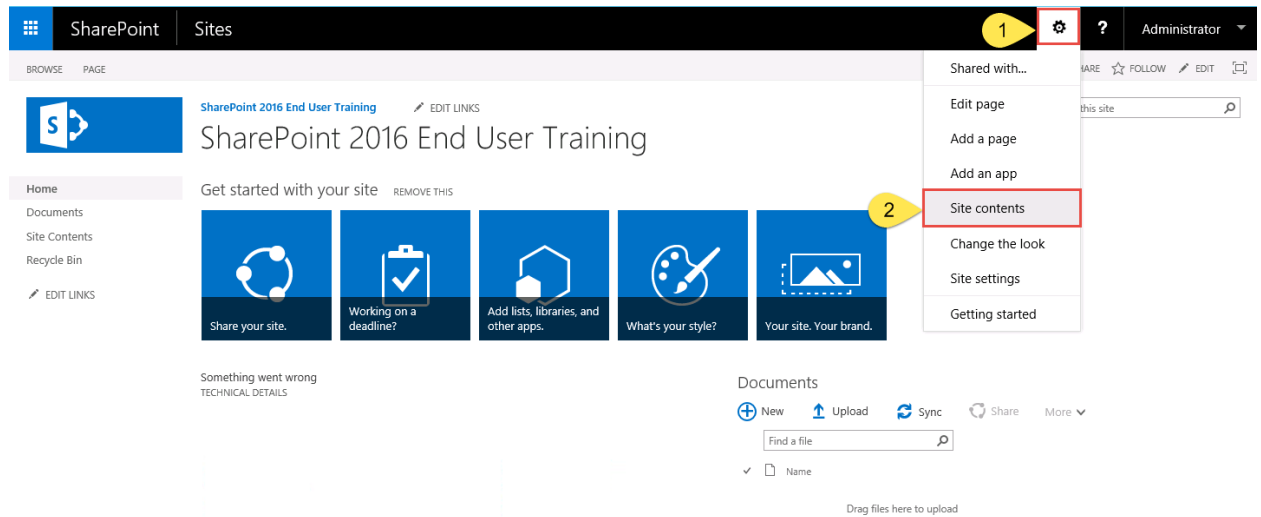


Figure 2.8.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the section 2.1.

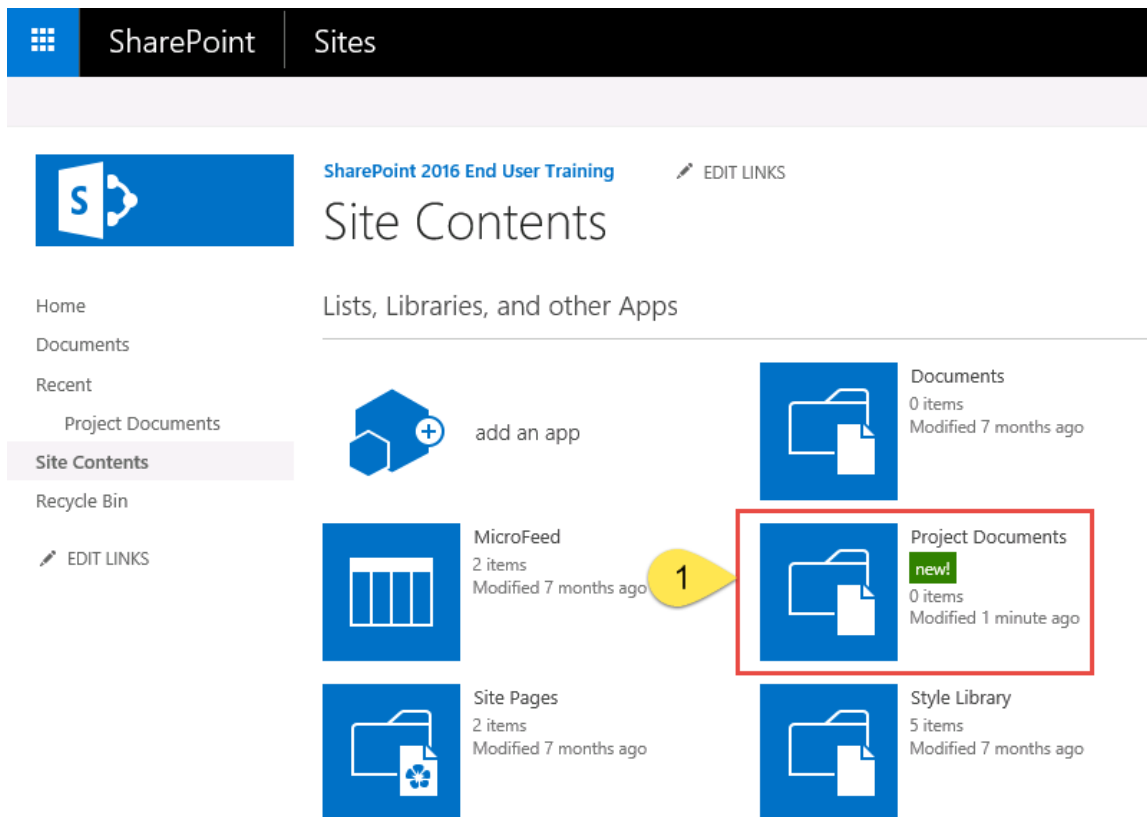


Figure 2.8.2: Site Contents Page

d) In the ribbon interface, click **Library** tab and then click **Library Settings** button.

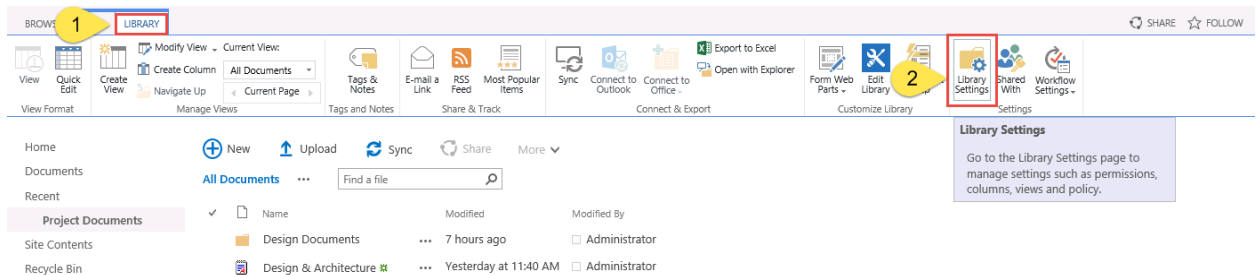


Figure 2.8.3: Ribbon Interface

e) In the **Settings** page, go to **General Settings** section and then click **Versioning Settings**.

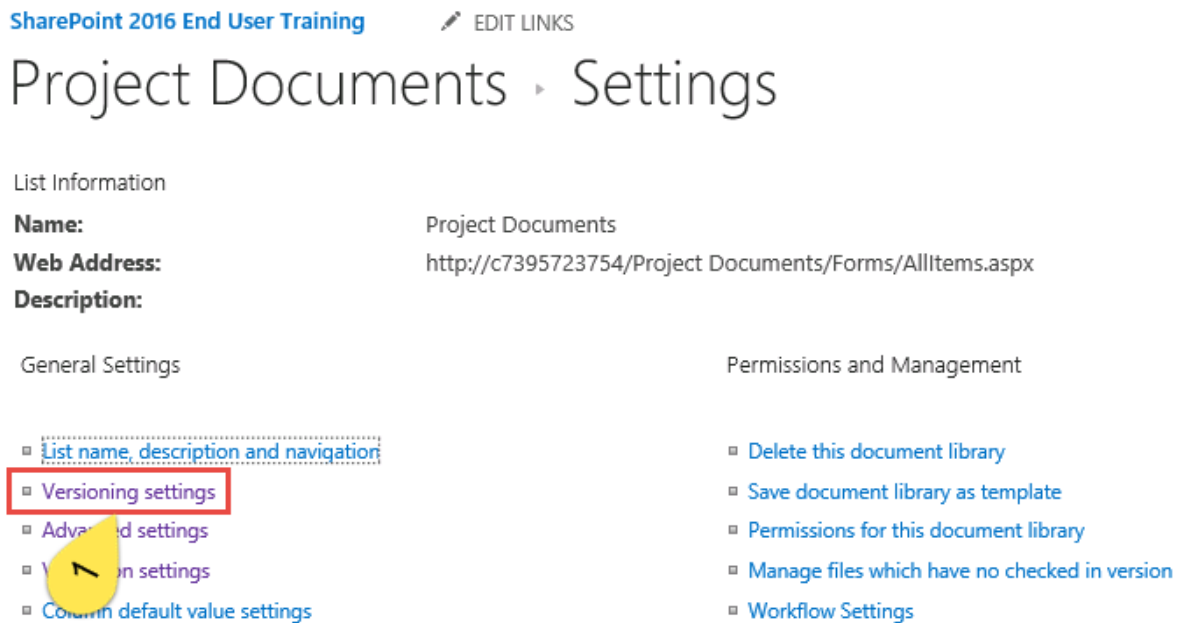


Figure 2.8.4: Library Settings Page

f) You can enable versioning in the document library based on your requirement. I have selected “Create major and minor (draft) versions” as shown in Fig 2.8.5. Click **OK** button.

Settings » Versioning Settings

Content Approval

Specify whether new items or changes to existing items should remain in a draft state until they have been approved. [Learn about requiring approval.](#)

Require content approval for submitted items?

☐ Yes ☒ No

Document Version History

Specify whether a version is created each time you edit a file in this document library. [Learn about versions.](#)

Create a version each time you edit a file in this document library?

☐ No versioning
☐ Create major versions
 Example: 1, 2, 3, 4
☒ Create major and minor (draft) versions
 Example: 1.0, 1.1, 1.2, 2.0

Optionally limit the number of versions to retain:

☒ Keep the following number of major versions:

500

☐ Keep drafts for the following number of major versions:

Figure 2.8.5: Versioning Settings Page

Result

Thus, in this section, you saw how to enable versioning in SharePoint 2016 Document Library.

2.9 How to check out a file in the Document Library

In this section, you will learn how to check out a file in SharePoint 2016 Document Library.

Check out a file:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon, and then click **Site Contents**.

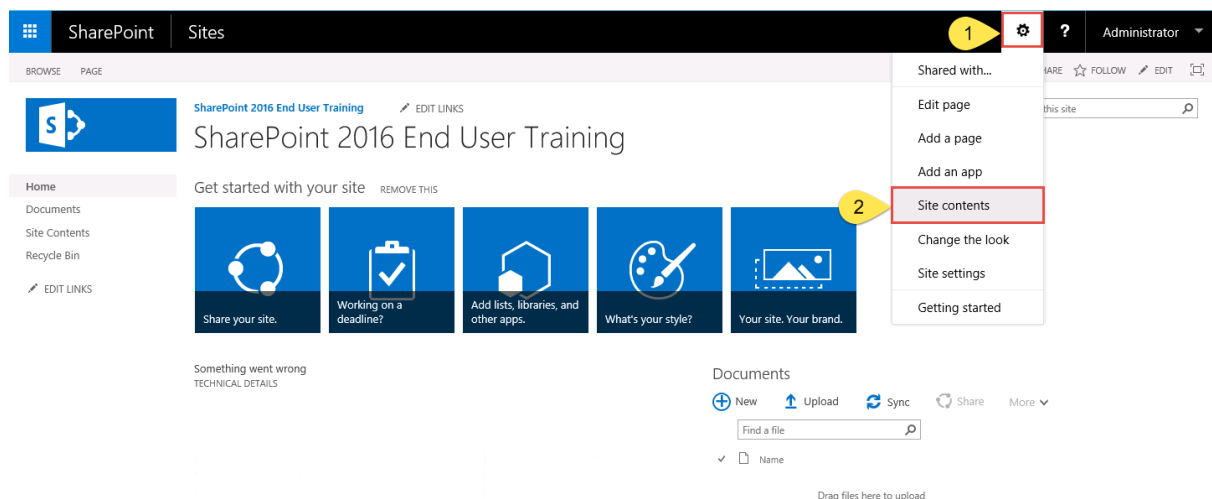


Figure 2.9.1: SharePoint 2016 Site

- c) Click **Project Documents** library which you have created in the section 2.1.

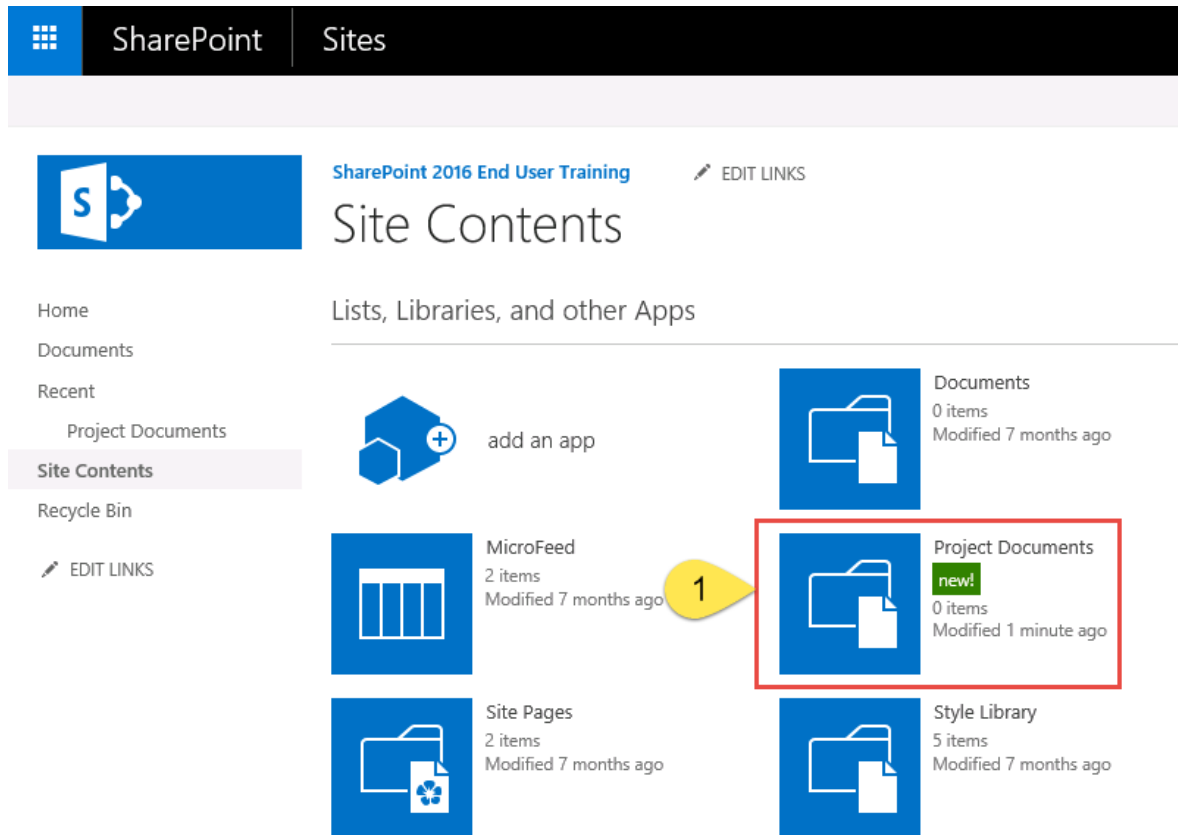


Figure 2.9.2: Site Contents Page

- d) Select the file that you want to check out. Click **Files** tab in the ribbon interface and then click **Check Out**.

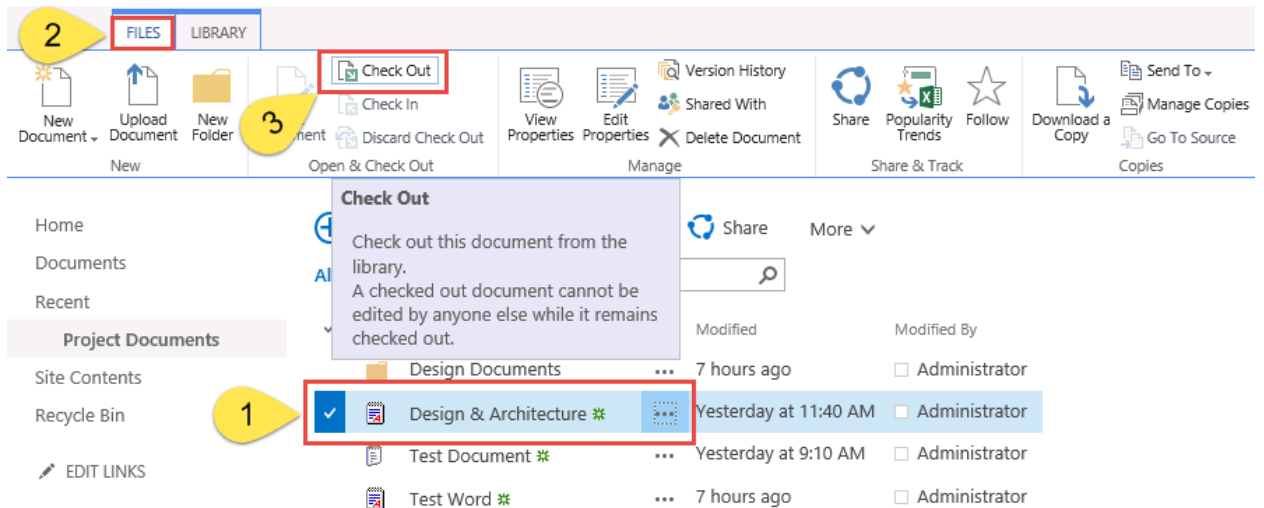


Figure 2.9.3: Check Out

- e) **Alternate Option:** Select the file you want to check out. Open **Menu Dialog** for selected item by clicking ‘...’ link next to the document. Go to **More actions** by clicking ‘...’ link. Click **Advanced** link and then click **Check out**.

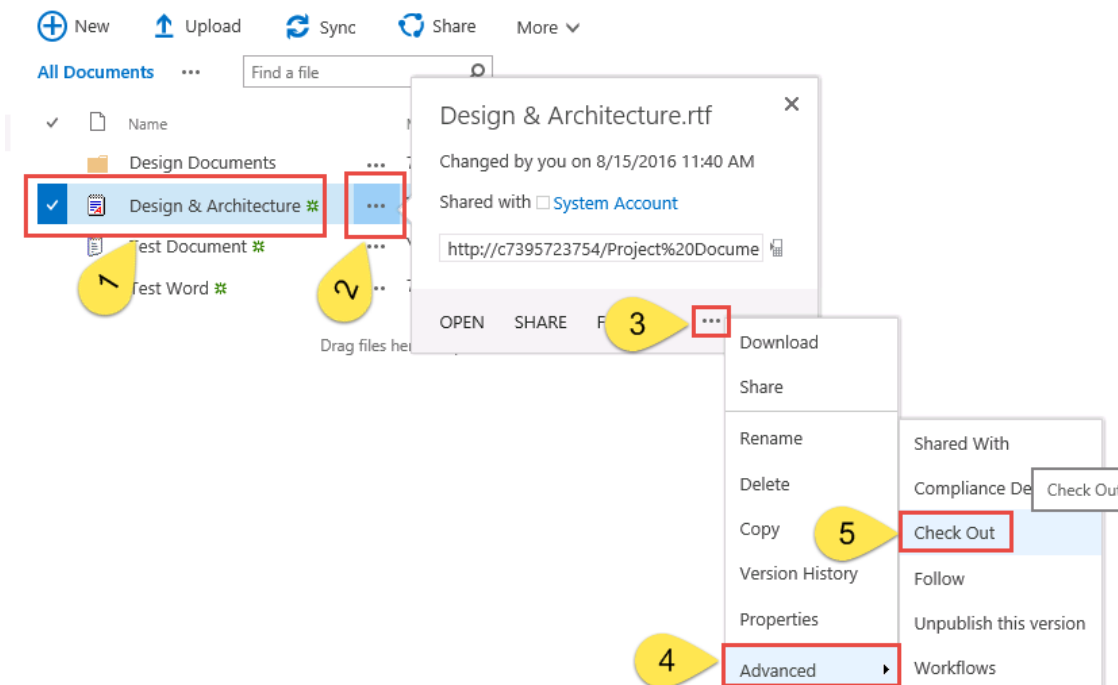


Figure 2.9.4: Check Out

Result

You can see the document checked out as shown in *Fig 2.9.5*. Thus, in this section, you saw how to check out a file in SharePoint 2016 Document Library.

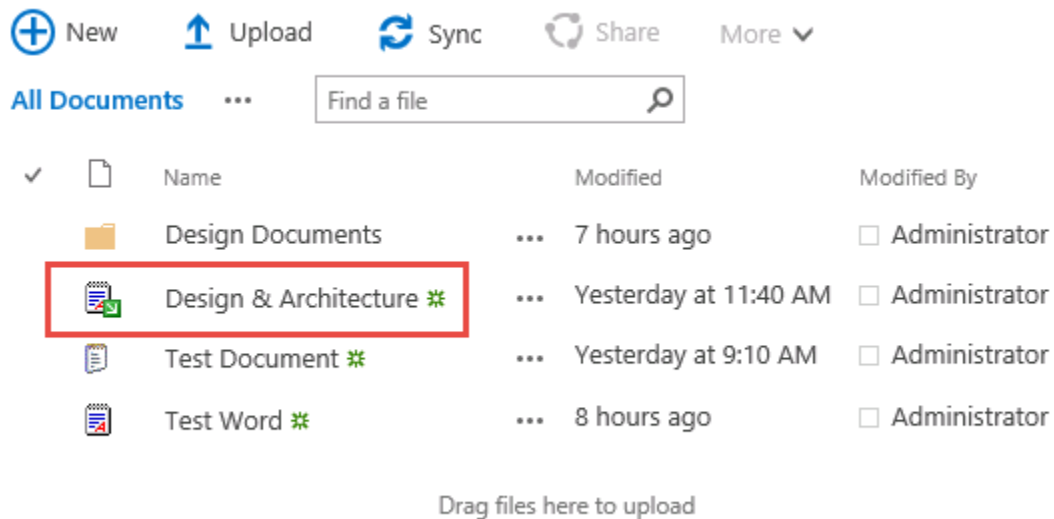


Figure 2.9.5: Checked out file

2.10 How to check in a file in the Document Library

In this section, you will learn how to check in a file in SharePoint 2016 Document Library.

Check in a file:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

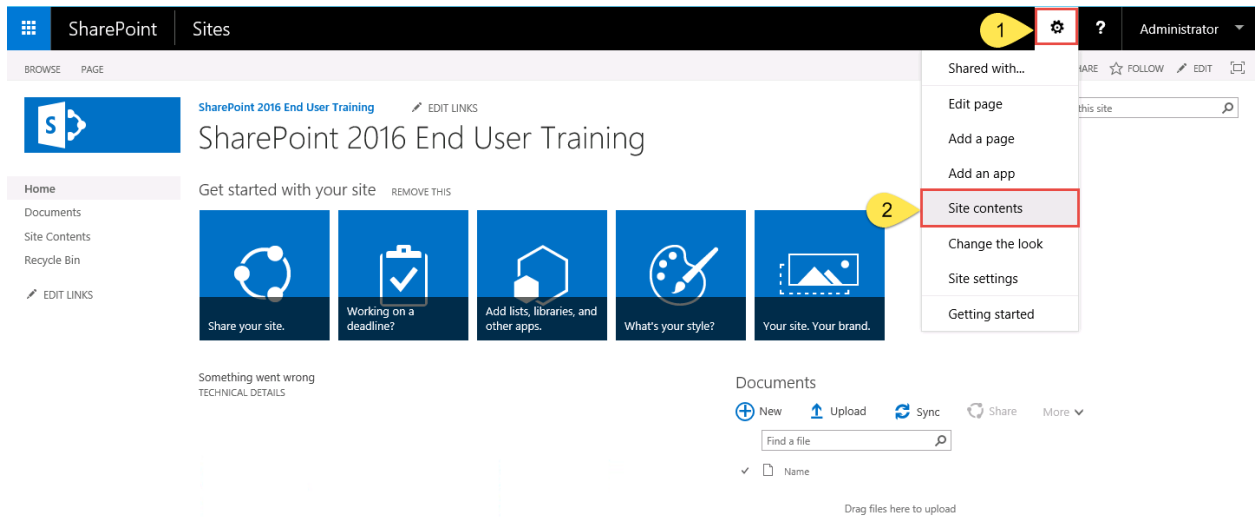


Figure 2.10.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the section 2.1.

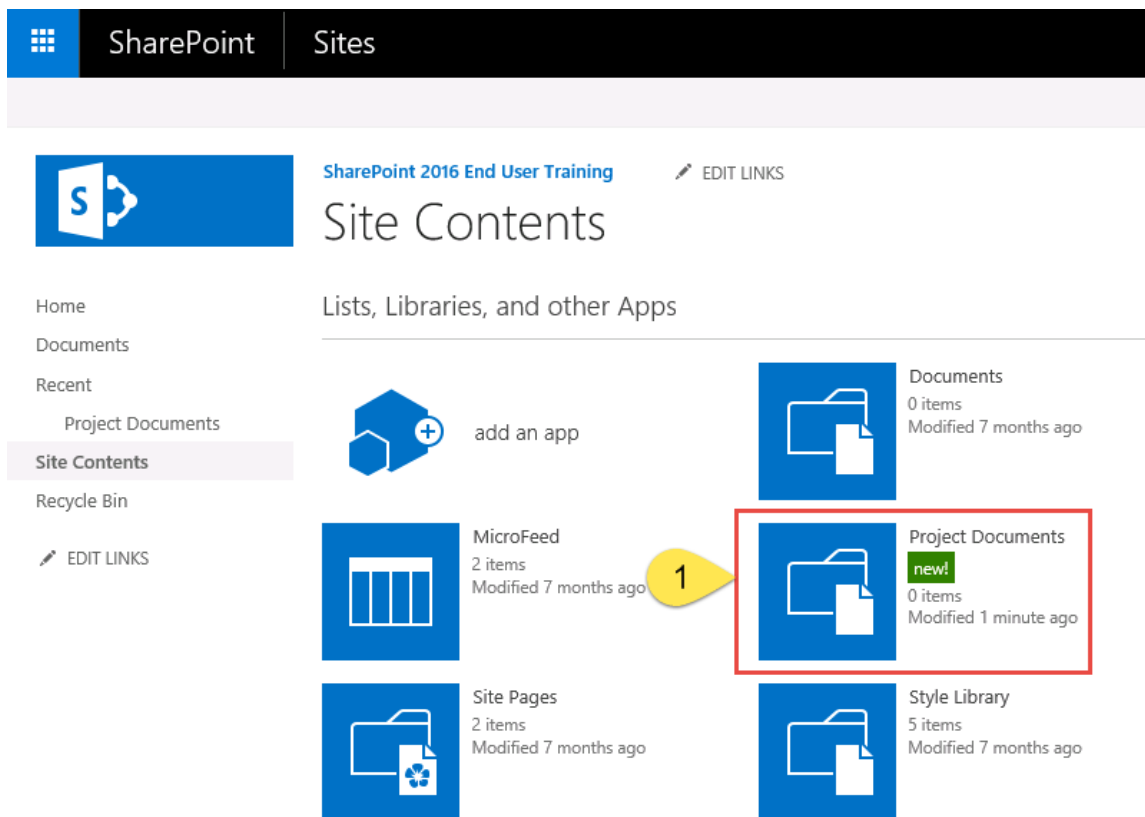


Figure 2.10.2: Site Contents Page

- d) Select the file that you want to check in, click **Files** tab in the ribbon interface and then click **Check In**.

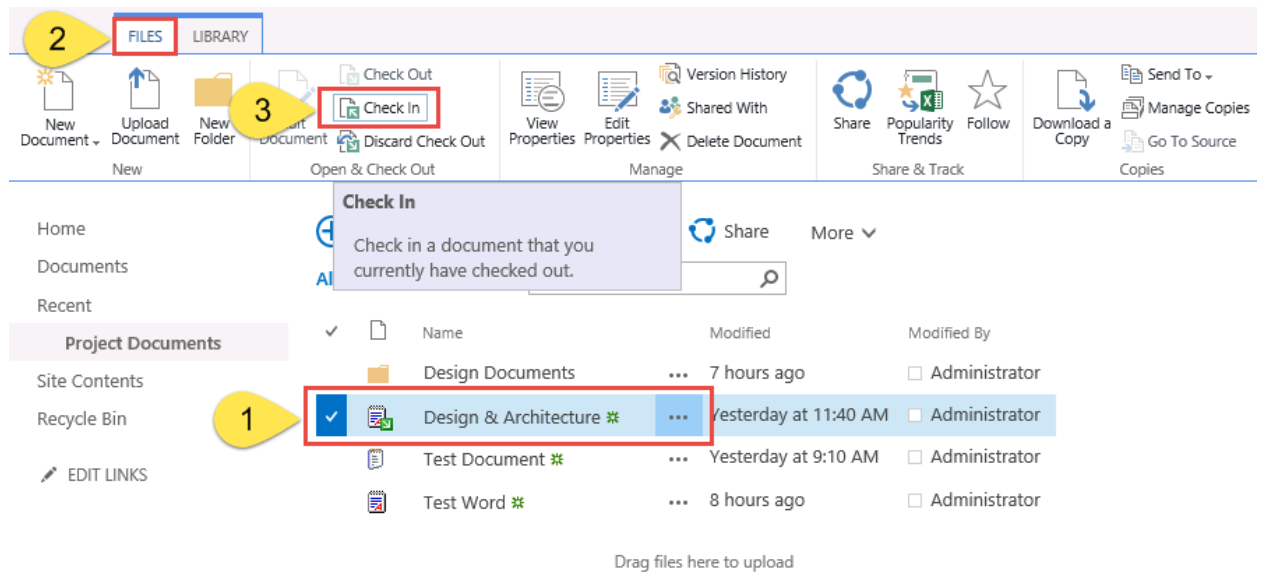


Figure 2.10.3: Check In

- e) Select the type of version you would like to check in, enter the check in comments and then click **Ok**.

Check in



Version

Select the type of version you would like to check in. 'Overwrite the current minor version' is not available when checking in multiple items.

1

What kind of version would you like to check in?

- ☐ Minor version (draft)
- ☒ Major version (publish)
- ☐ Overwrite the current minor version

Retain Check Out

Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.

Retain your check out after checking in?

- ☐ Yes
- ☒ No

Comments

Type comments describing what has changed in this version.

2

Comments:

Document Looks Good!!!

3

OK

Cancel

Figure 2.10.4: Check In

- f) **Alternate Option:** Select the file that you want to check out. Open **Menu Dialog** for selected item by clicking '...' link next to the document. Go to **More actions** by clicking '...' link. Click **Advanced** link and then click **Check In**.

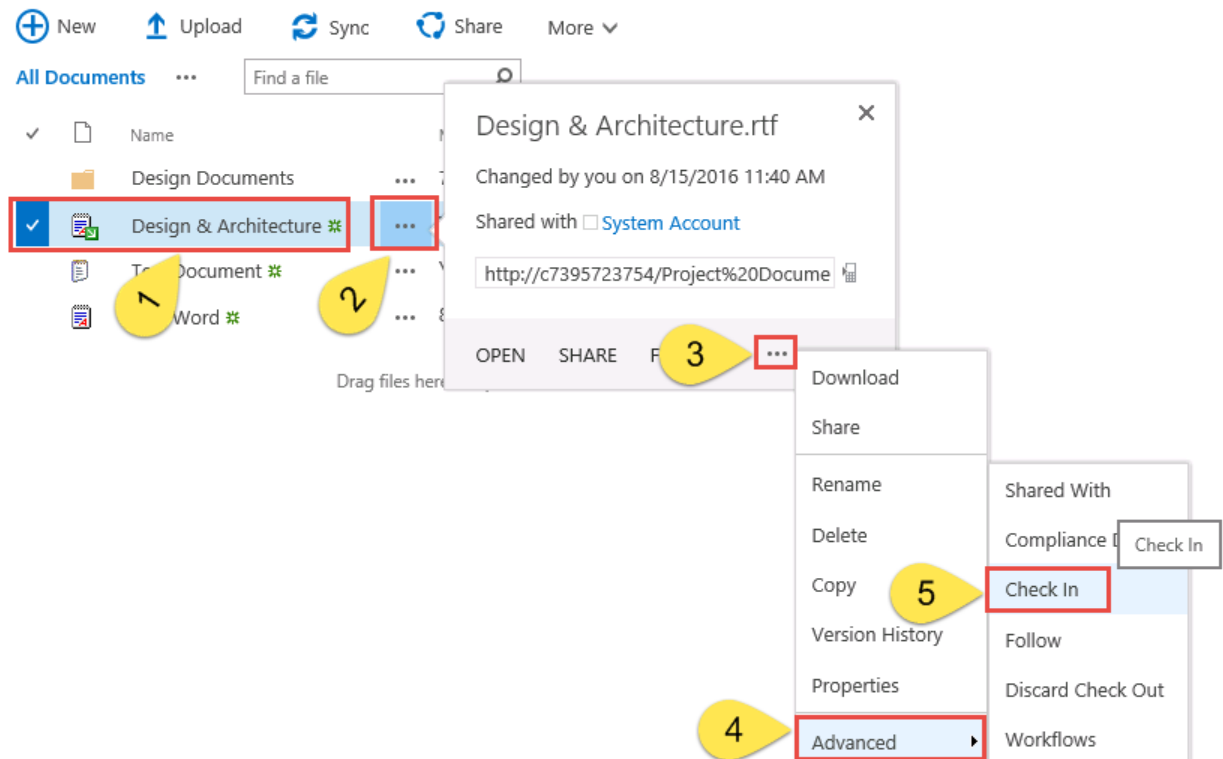


Figure 2.10.5: Check In

- g) Select the type of version you would like to check in, enter the check in comments, and then click **OK**.

Result

The document is checked in successfully. Thus, in this section, you saw how to check in a file in SharePoint 2016 Document Library.

2.11 How to discard the checked out file in the Document Library

In this section, you will learn how to discard the checked out file in SharePoint 2016 Document Library.

Discard Check Out:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

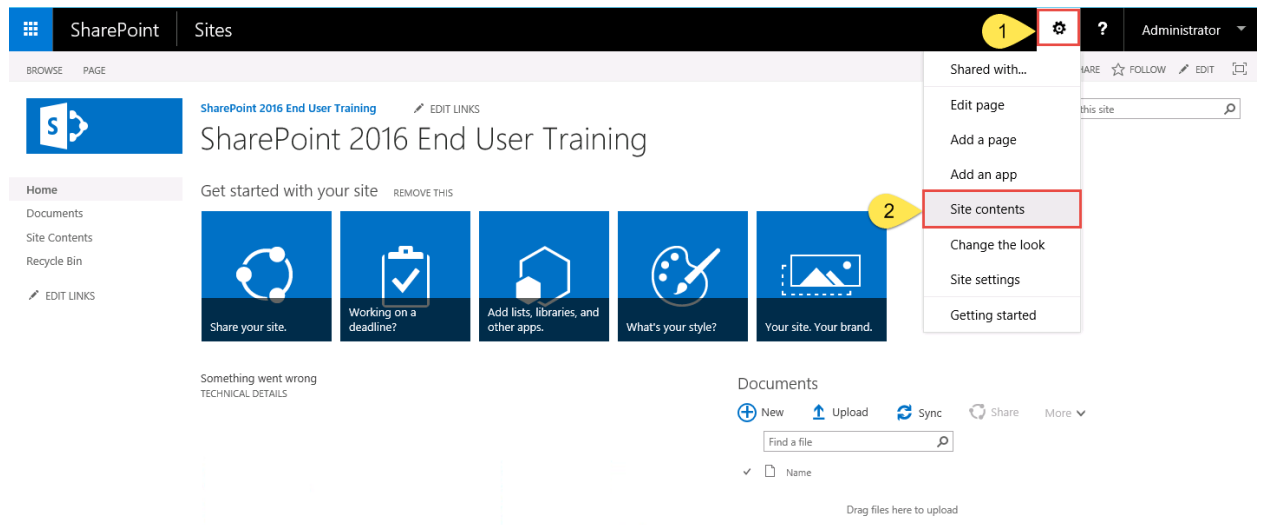


Figure 2.11.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the section 2.1.

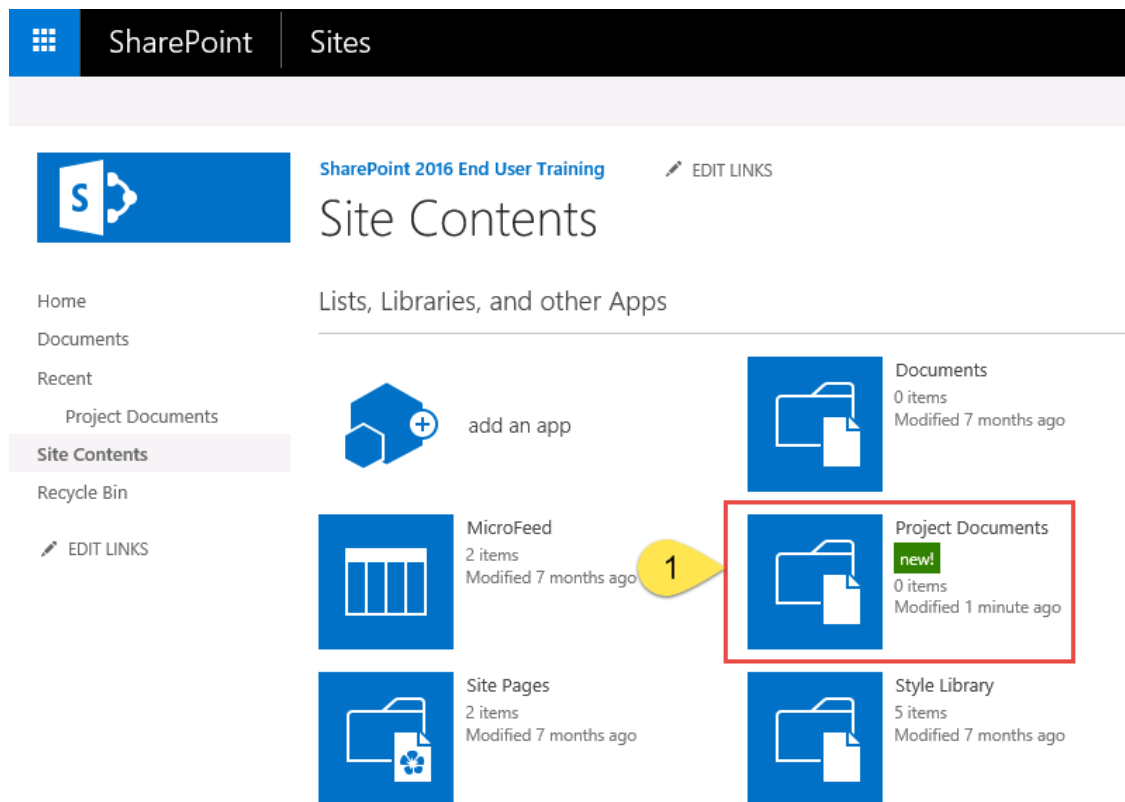


Figure 2.11.2: Site Contents Page

- d) Select the file that you want to discard check out. Click **Files** tab in the ribbon interface and then click **Discard Check Out**.

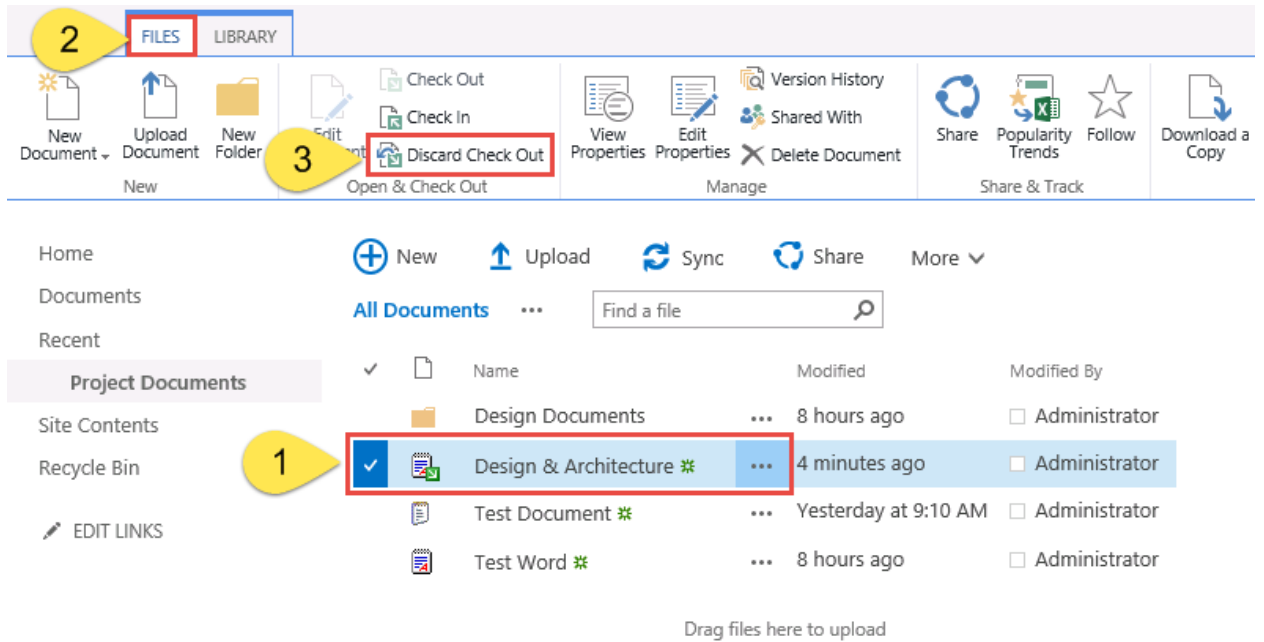


Figure 2.11.3: Discard Check Out

- e) **Alternate Option:** Select the file that you want to check out, Open **Menu Dialog** for selected item by clicking ‘...’ link next to the document. Go to **More actions** by clicking ‘...’ link. Click **Advanced** link and then click **Discard Check Out**.

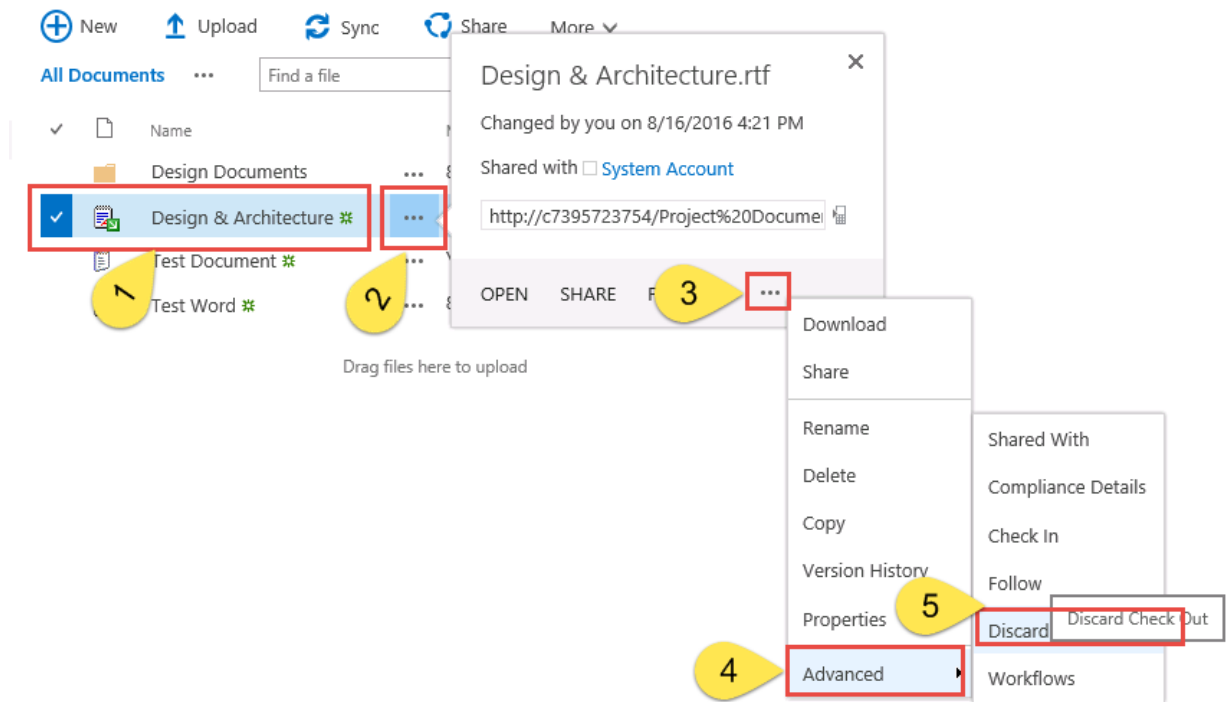


Figure 2.11.4: Discard Check Out

Result

Thus, in this section, you saw how to discard the checked out file in SharePoint 2016 Document Library.

2.12 How to delete a previous version of a file in the Document Library

In this section, you will learn how to delete a previous version of a file in SharePoint 2016 Document Library.

Delete a previous version of a file:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

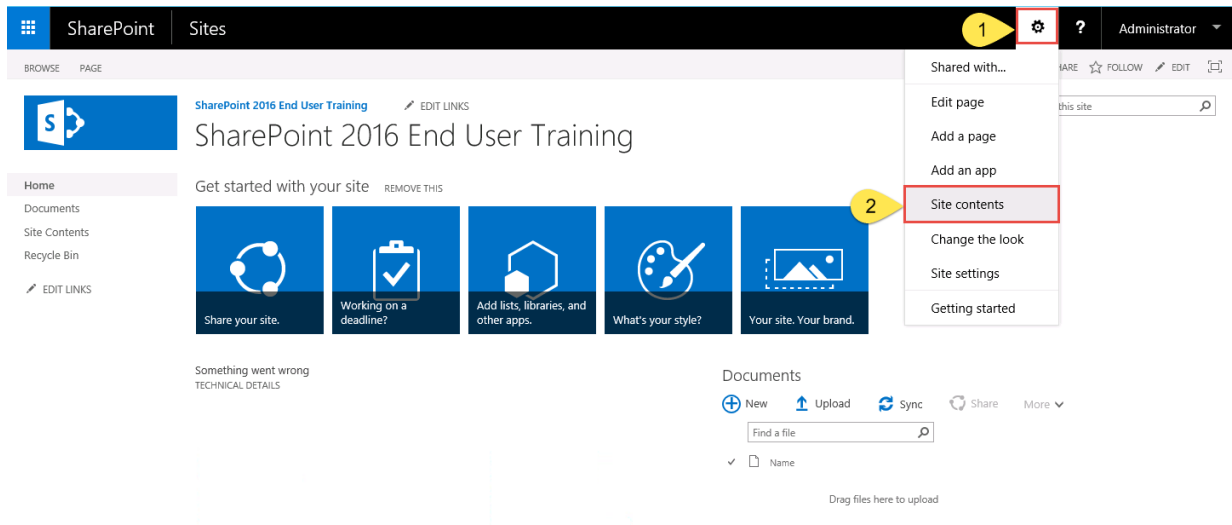


Figure 2.12.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the section 2.1.

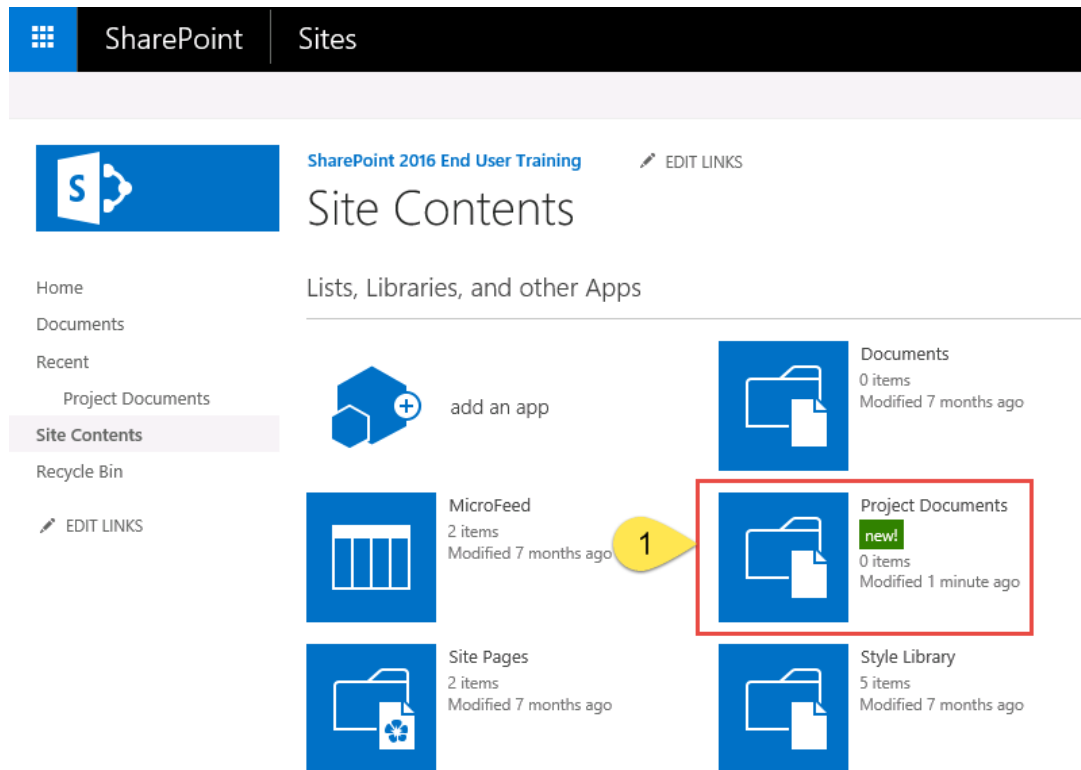


Figure 2.12.2: Site Contents Page

- d) Select the file that you want to delete a file version, click **Files** tab in the ribbon interface and then click **Version History**.

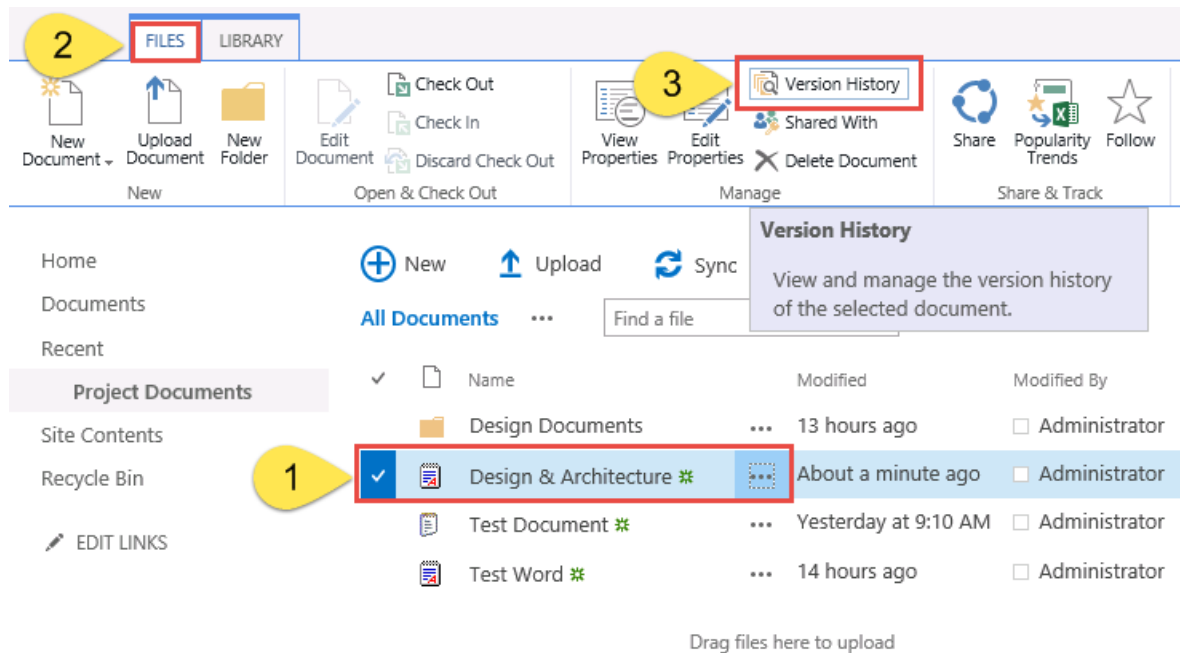


Figure 2.12.3: Version History

- e) In the **Version History** page, hover over the date time column for the version which you want to delete. Click **Delete**.

Version History



Delete All Versions | Delete Minor Versions

No. ↓	Modified	Modified By	Size	Comments
This is the current published major version				
3.1	8/16/2016 9:53 PM	<input type="checkbox"/> Administrator	< 1 KB	
3.0	8/16/2016 9:53 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.4	8/16/2016 9:53 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.3	8/16/2016 9:53 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.1	8/16/2016 4:39 PM	<input type="checkbox"/> Administrator	< 1 KB	Major Version
2.0	8/16/2016 4:21 PM	<input type="checkbox"/> Administrator	< 1 KB	
1.0	8/15/2016 11:40 AM	<input type="checkbox"/> Administrator	< 1 KB	

Figure 2.12.4: Delete the version

- f) Make sure you want to send this version to site Recycle Bin by clicking **Ok** button.

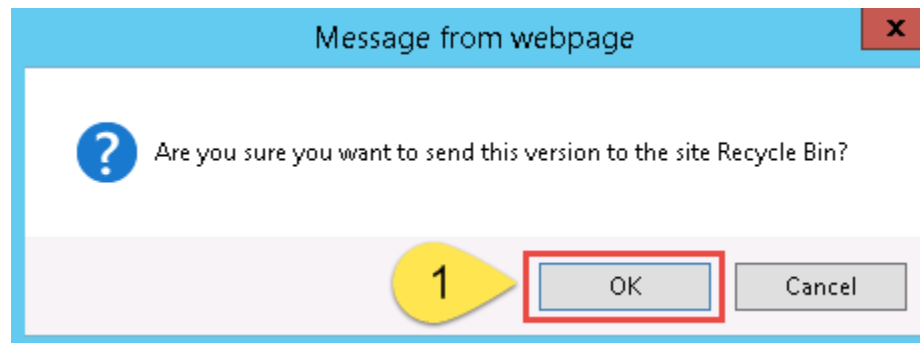


Figure 2.12.5: Pop-up message

- g) **Alternate Option:** Select the file that you want to delete a file version, **Open Menu Dialog** for selected item by clicking ‘...’ link next to the document. Go to **More actions** by clicking ‘...’ link. Click **Version History**.

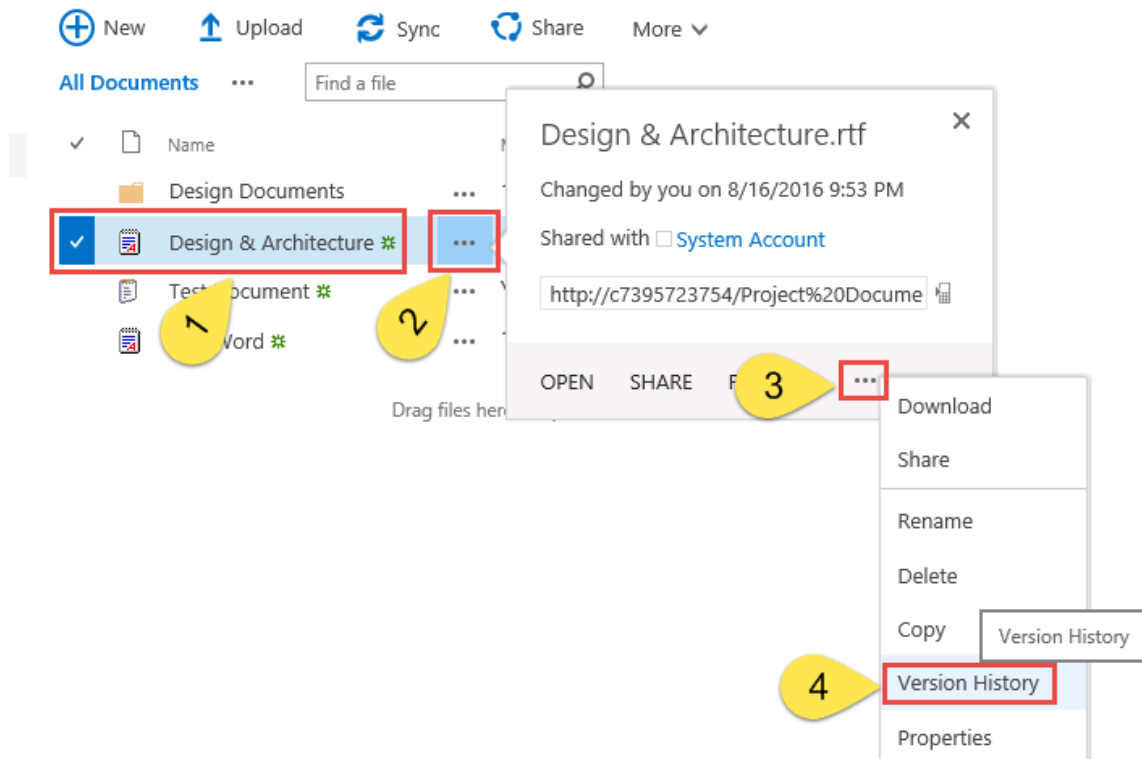


Figure 2.12.6: Version History

Result

You can see the version got deleted successfully. Version 3 which you have deleted will not be shown in the version history page as shown in *Fig 2.12.7*. Thus, in this section, you saw how to delete a previous version of a file in SharePoint 2016 Document Library.

Version History



[Delete All Versions](#) | [Delete Minor Versions](#)

No. ↓	Modified	Modified By	Size	Comments
This is the current published major version				
4.0	8/16/2016 9:53 PM	<input type="checkbox"/> Administrator	< 1 KB	
3.1	8/16/2016 9:53 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.4	8/16/2016 9:52 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.3	8/16/2016 9:52 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.2	8/16/2016 9:51 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.1	8/16/2016 4:39 PM	<input type="checkbox"/> Administrator	< 1 KB	Major Version
2.0	8/16/2016 4:21 PM	<input type="checkbox"/> Administrator	< 1 KB	
1.0	8/15/2016 11:40 AM	<input type="checkbox"/> Administrator	< 1 KB	

Figure 2.12.7: Version History

2.13 How to restore a file version in the Document Library

In this section, you will learn how to restore a file version in SharePoint 2016 Document Library.

Restore a file version:

Before you want to restore a file make sure the file is checked out or else you will get an error message as shown in *Fig 2.13.1*.

Version History

x

Sorry, something went wrong

The file "http://c7395723754/Project Documents/Design & Architecture.rtf" is not checked out. You must first check out this document before making changes.

[TECHNICAL DETAILS](#)
[GO BACK TO SITE](#)

Figure 2.13.1: Error message

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

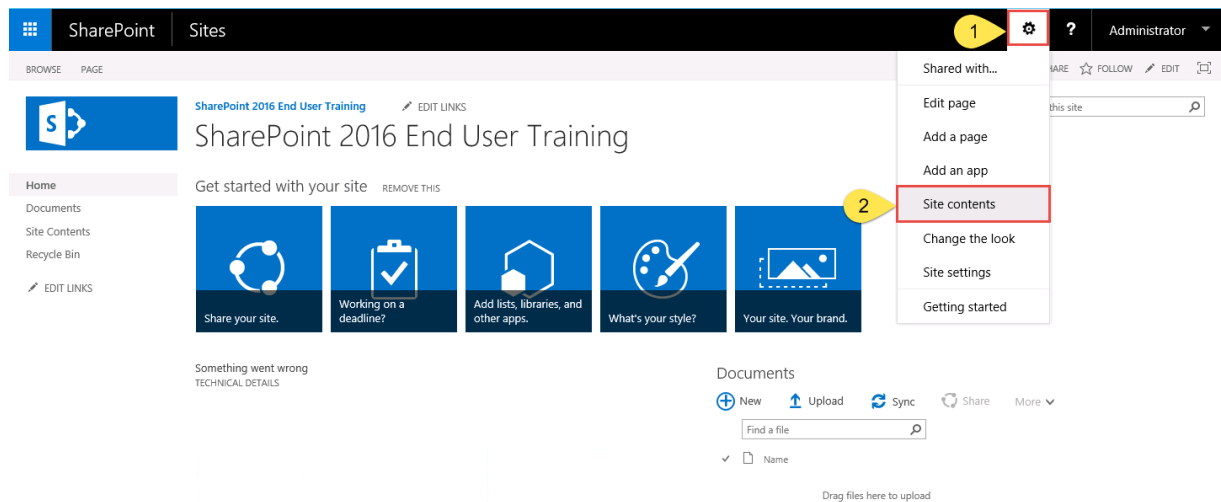


Figure 2.13.2: SharePoint 2016 Site

- Click **Project Documents** library which you have created in the section 2.1.

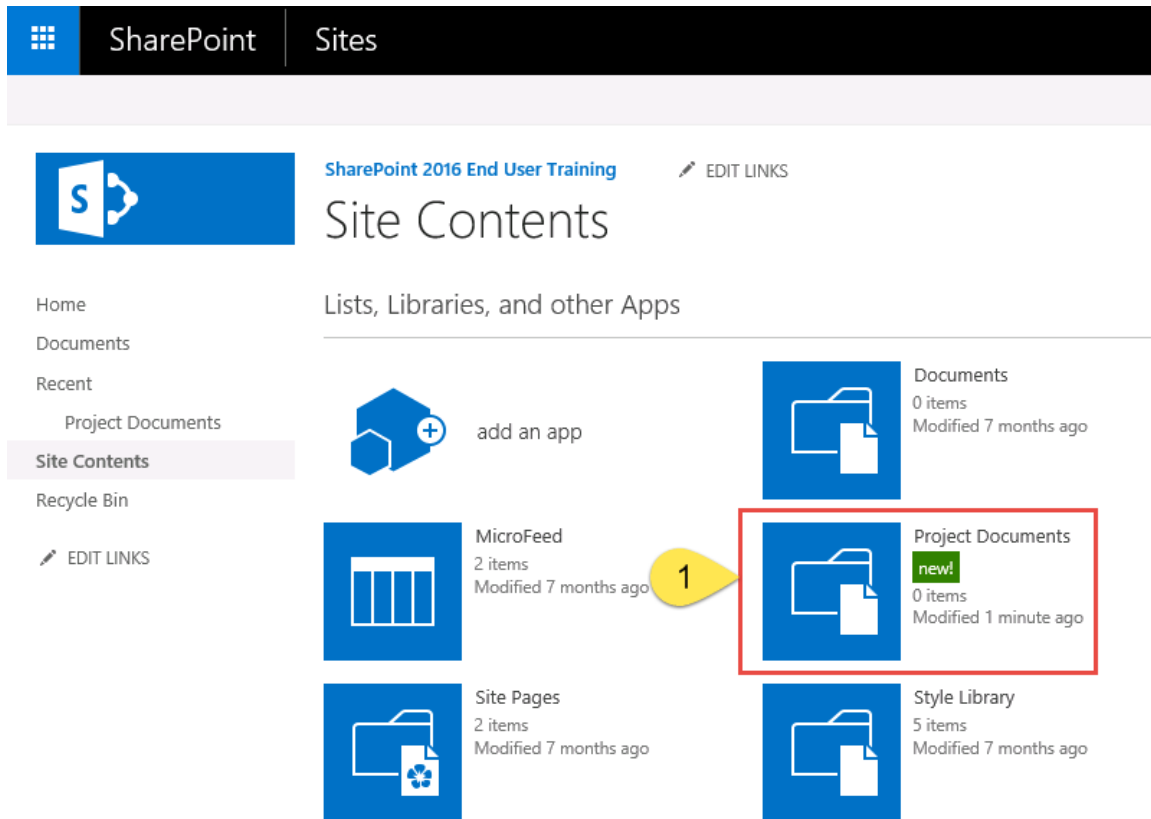


Figure 2.13.3: Site Contents Page

- d) Select the file that you want to restore a file version, click **Files** tab in the ribbon interface and then click **Version History**.

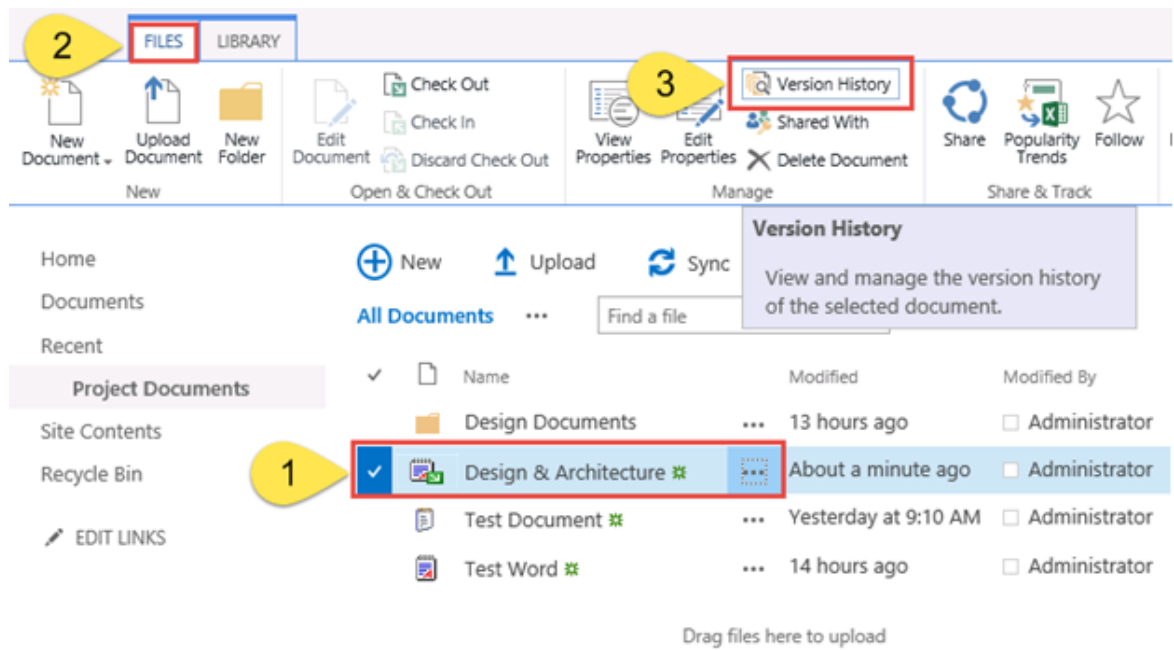


Figure 2.13.4: Version History

- e) In the **Version History** page, hover over the date time column for the version which you want to restore. Click **Restore**.

Version History



Delete All Versions | Delete Minor Versions

No. ↓	Modified	Modified By	Size	Comments
4.1	8/16/2016 9:53 PM	<input type="checkbox"/> Administrator	< 1 KB	
4.0	8/16/2016 9:53 PM	<input type="checkbox"/> Administrator	< 1 KB	
3.1	8/16/2016 9:53 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.4		<input type="checkbox"/> Administrator	< 1 KB	
2.3		<input type="checkbox"/> Administrator	< 1 KB	
2.2		<input type="checkbox"/> Administrator	< 1 KB	
2.1	8/16/2016 4:39 PM	<input type="checkbox"/> Administrator	< 1 KB	Major Version
2.0	8/16/2016 4:21 PM	<input type="checkbox"/> Administrator	< 1 KB	
1.0	8/15/2016 11:40 AM	<input type="checkbox"/> Administrator	< 1 KB	

Figure 2.13.5: Restore a file version

- f) Make sure you want to replace the current version with the selected version by clicking **Ok** button.

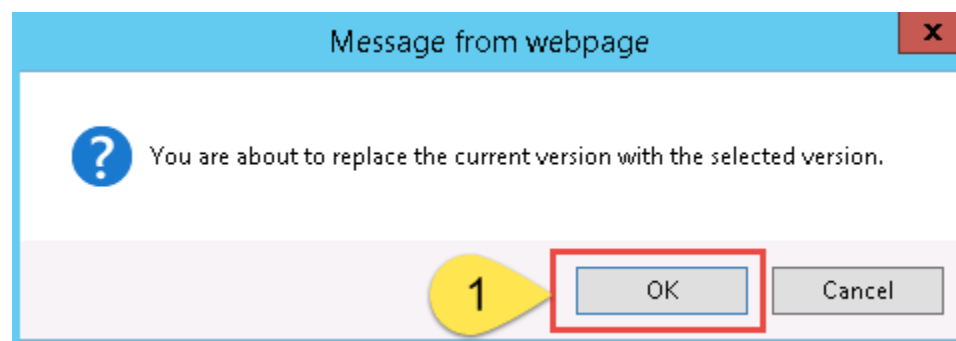


Figure 2.13.6: Pop-up message

- g) **Alternate Option:** Select the file that you want to restore a file version, **Open Menu Dialog** for selected item by clicking ‘...’ link next to the document. Go to **More actions** by clicking ‘...’ link. Click **Version History**.

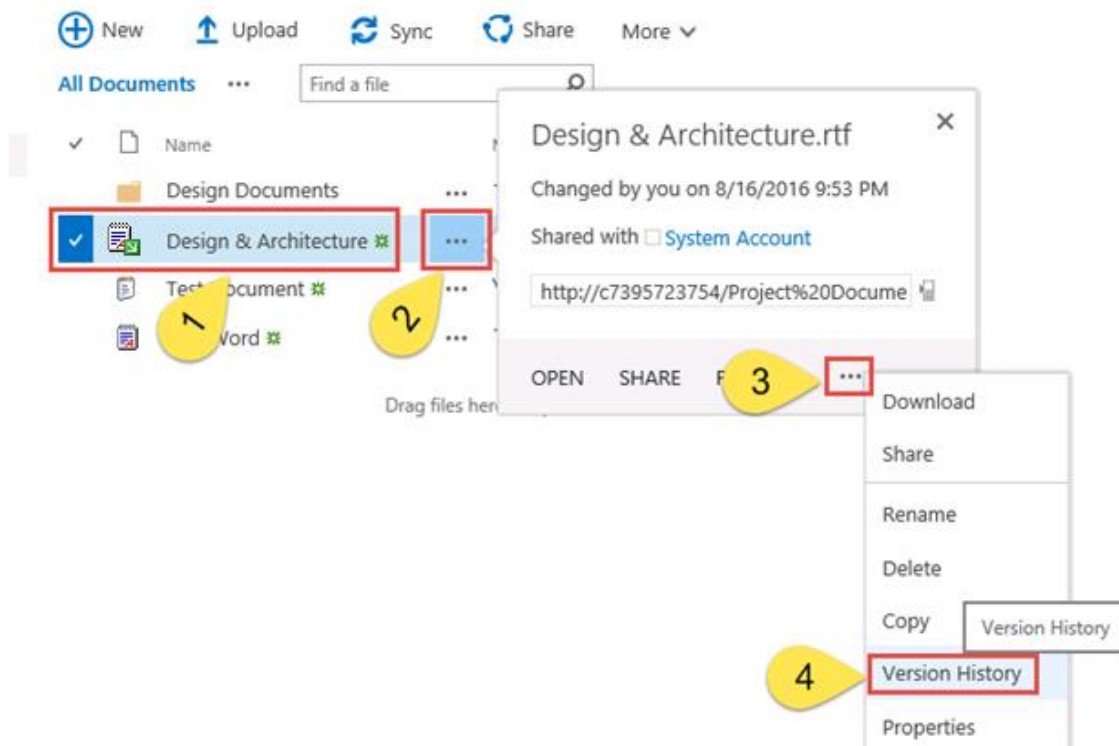


Figure 2.13.7: Version History

Result

You can see the version got restored successfully. Thus, in this section, you saw how to delete a previous version of a file in SharePoint 2016 Document Library.

Version History



[Delete All Versions](#) | [Delete Minor Versions](#)

No. ↓	Modified	Modified By	Size	Comments
This is the current published major version				
4.0	8/16/2016 9:53 PM	<input type="checkbox"/> Administrator	< 1 KB	
3.1	8/16/2016 9:53 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.4	8/16/2016 9:52 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.3	8/16/2016 9:52 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.2	8/16/2016 9:51 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.1	8/16/2016 4:39 PM	<input type="checkbox"/> Administrator	< 1 KB	Major Version
2.0	8/16/2016 4:21 PM	<input type="checkbox"/> Administrator	< 1 KB	
1.0	8/15/2016 11:40 AM	<input type="checkbox"/> Administrator	< 1 KB	

Figure 2.13.8: Version History

2.14 How to Delete All Versions for a file in the Document Library

In this section, you will learn how to delete all versions for a file in SharePoint 2016 Document Library.

Delete All Versions for a file:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

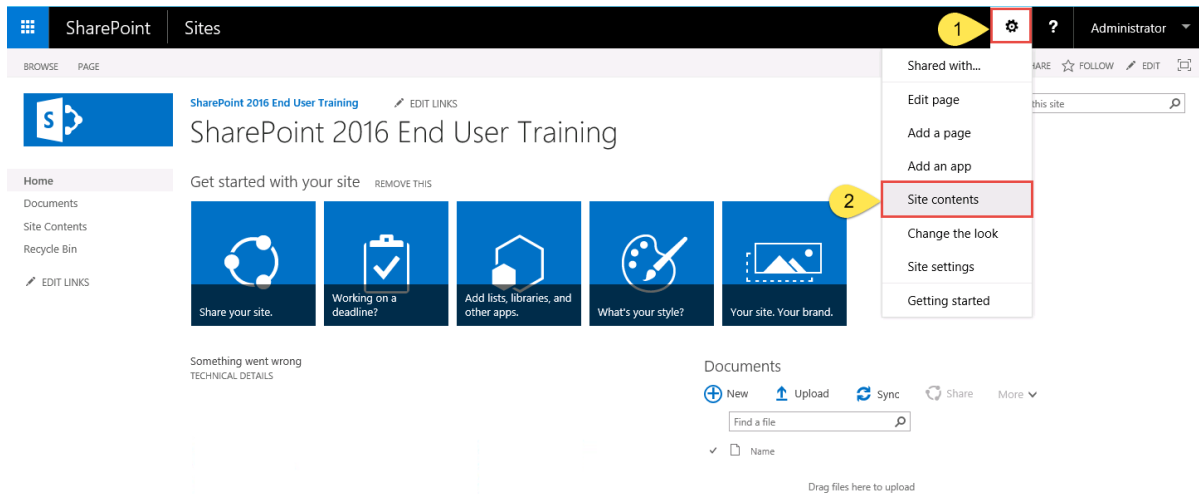


Figure 2.14.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the [section 2.1](#).

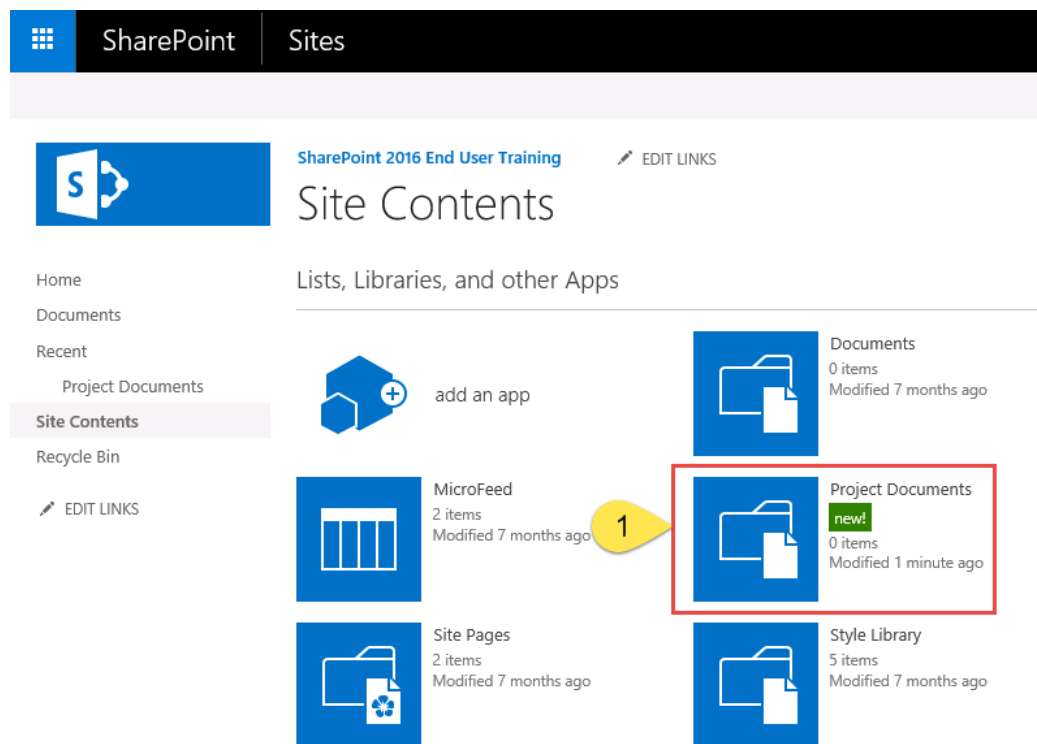


Figure 2.14.2: Site Contents Page

- d) Select the file for which you want to delete all versions, click **Files** tab in the ribbon interface and then click **Version History**.

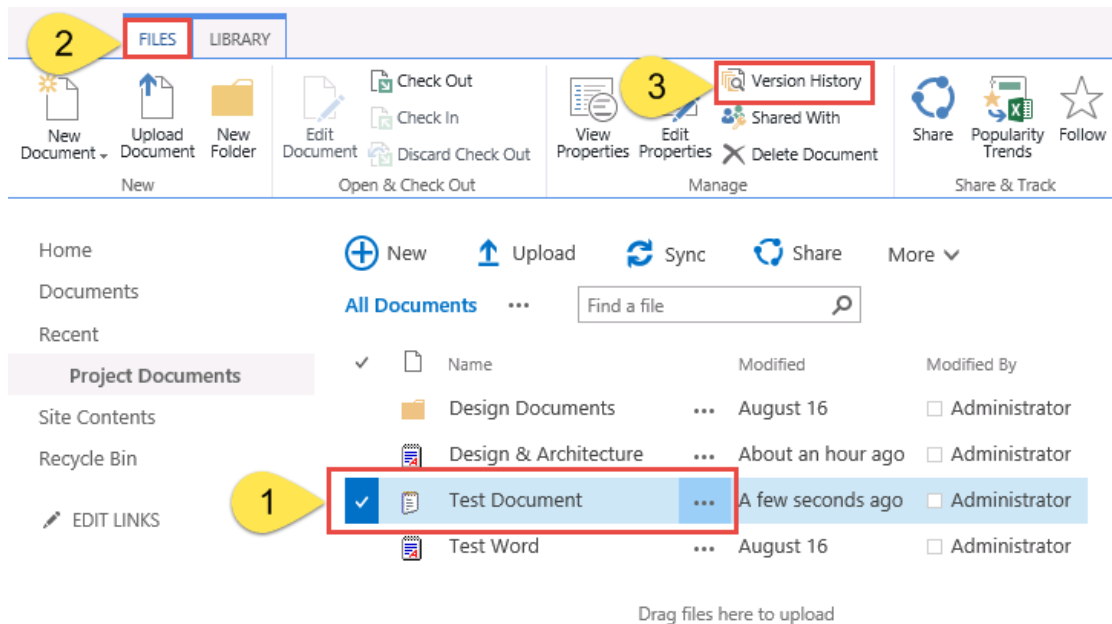


Figure 2.14.3: Version History

- e) In the **Version History** page, click **Delete All Versions**.

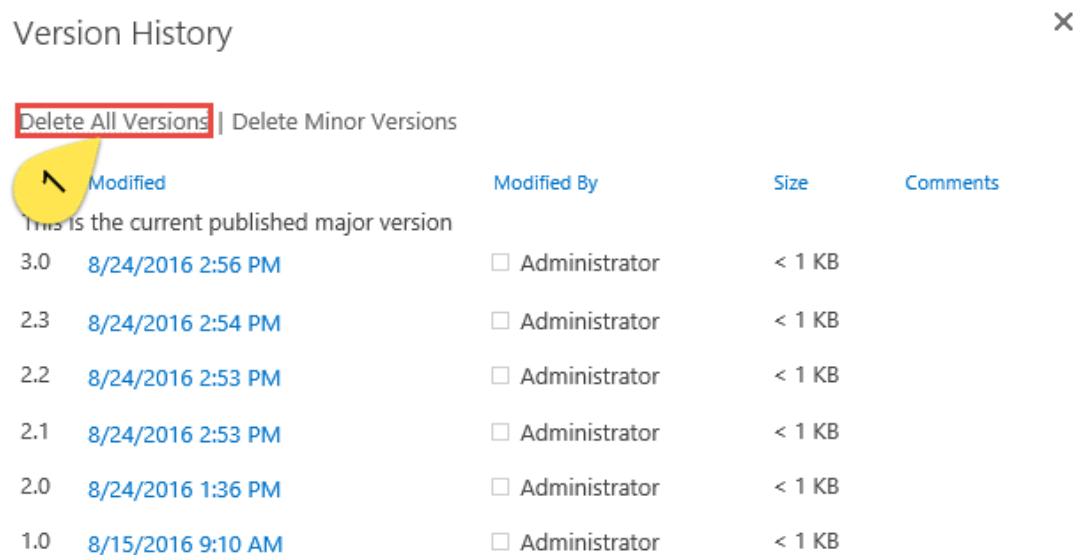


Figure 2.14.4: Version History Page

- f) Make sure you want to send all previous versions associated with this file to the site Recycle Bin by clicking **Ok** button.

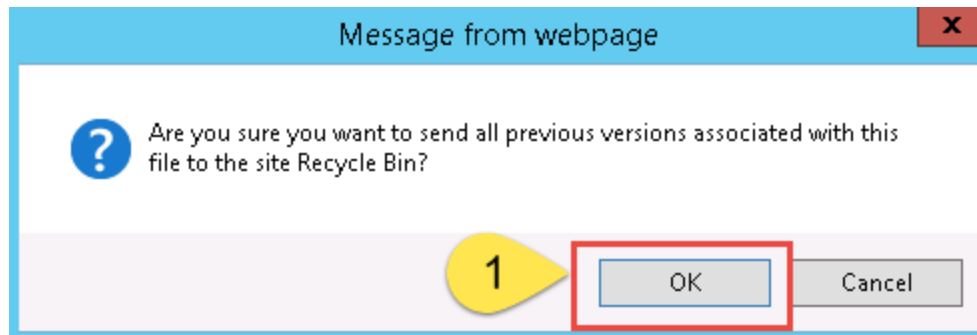


Figure 2.14.5: A Pop-up message

- g) **Alternate Option:** Select the file for which you want to delete all versions, **Open Menu Dialog** for selected item by clicking ‘...’ link next to the document. Go to **More actions** by clicking ‘...’ link. Click **Version History**.

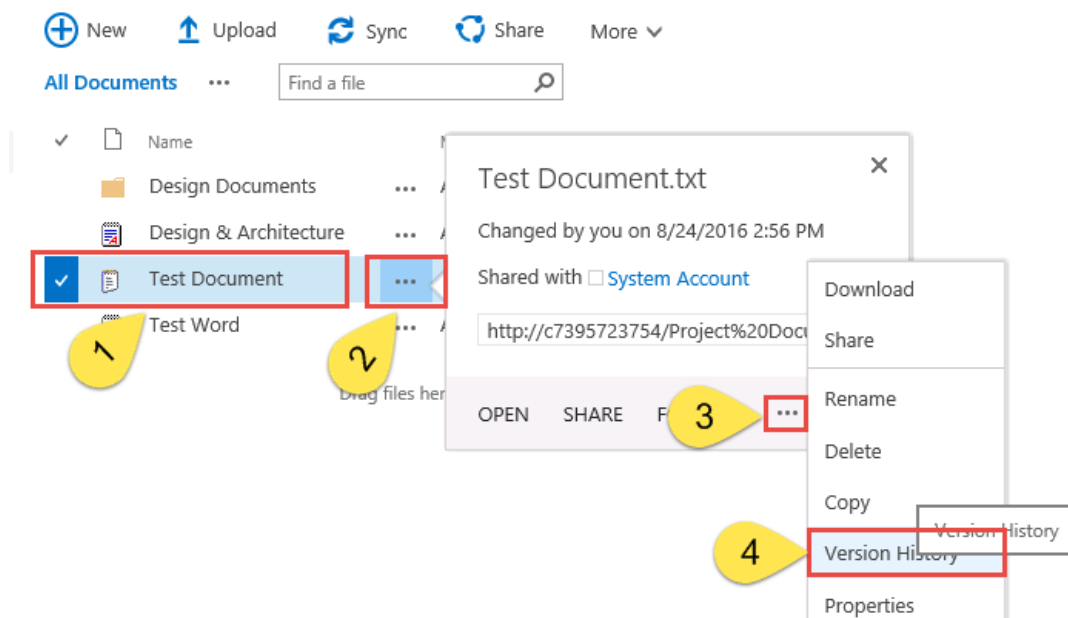


Figure 2.14.6: Version History

Result

You can see all previous versions are deleted in the version history page as shown in *Fig 2.14.7*. Thus, in this section, you saw how to delete all versions for a file in SharePoint 2016 Document Library.

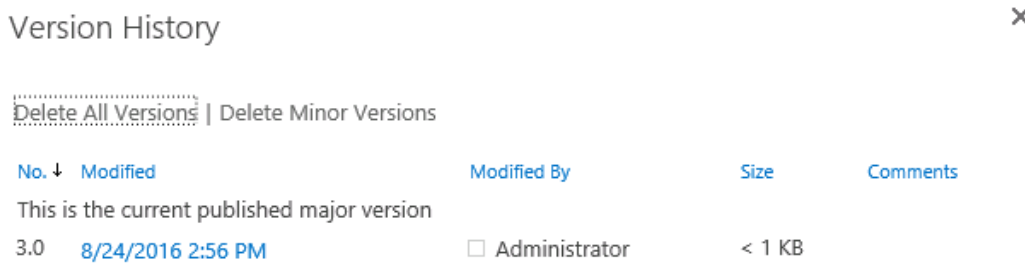


Figure 2.14.7: Version History Page

2.15 How to Delete Minor Versions for a file in the Document Library

In this section, you will learn how to delete minor versions for a file in SharePoint 2016 Document Library.

Delete Minor Versions for a file:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

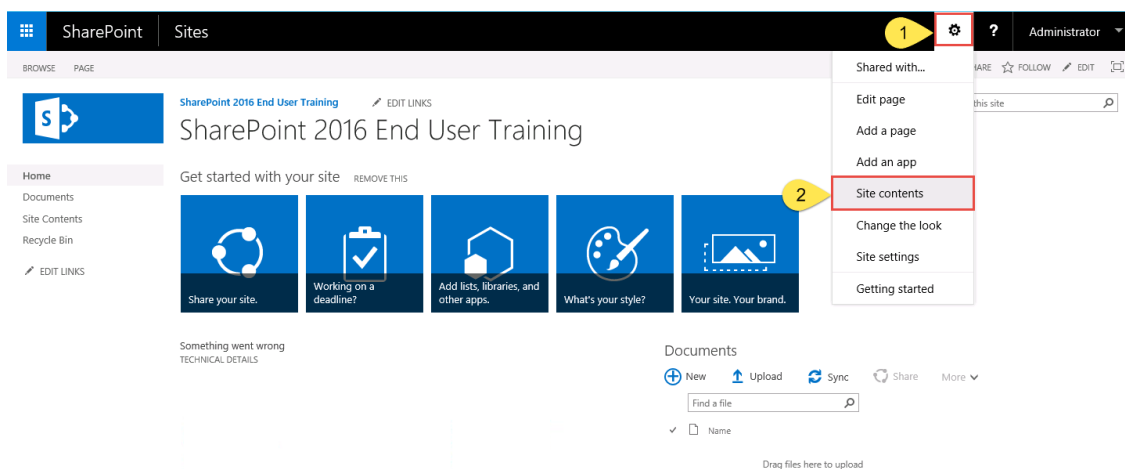


Figure 2.15.1: SharePoint 2016 Site

- c) Click **Project Documents** library which you have created in the [section 2.1](#).

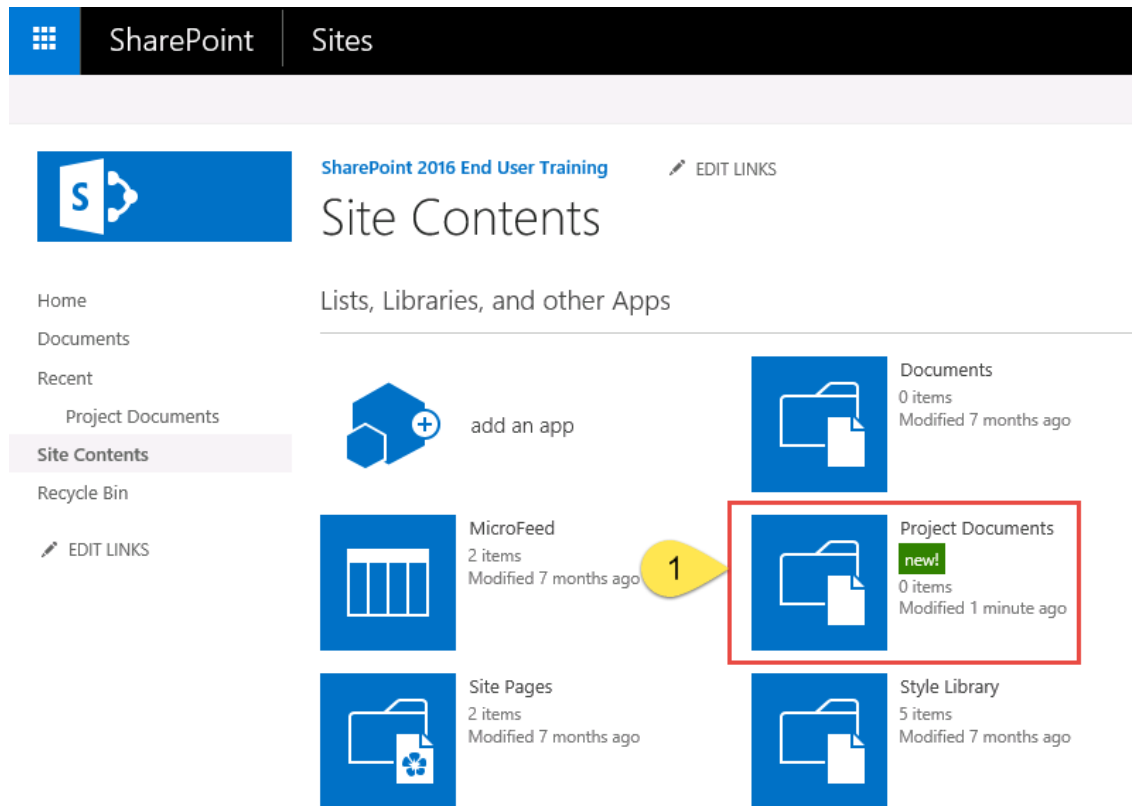


Figure 2.15.2: Site Contents Page

- d) Select the file for which you want to delete minor versions, click **Files** tab in the ribbon interface and then click **Version History**.

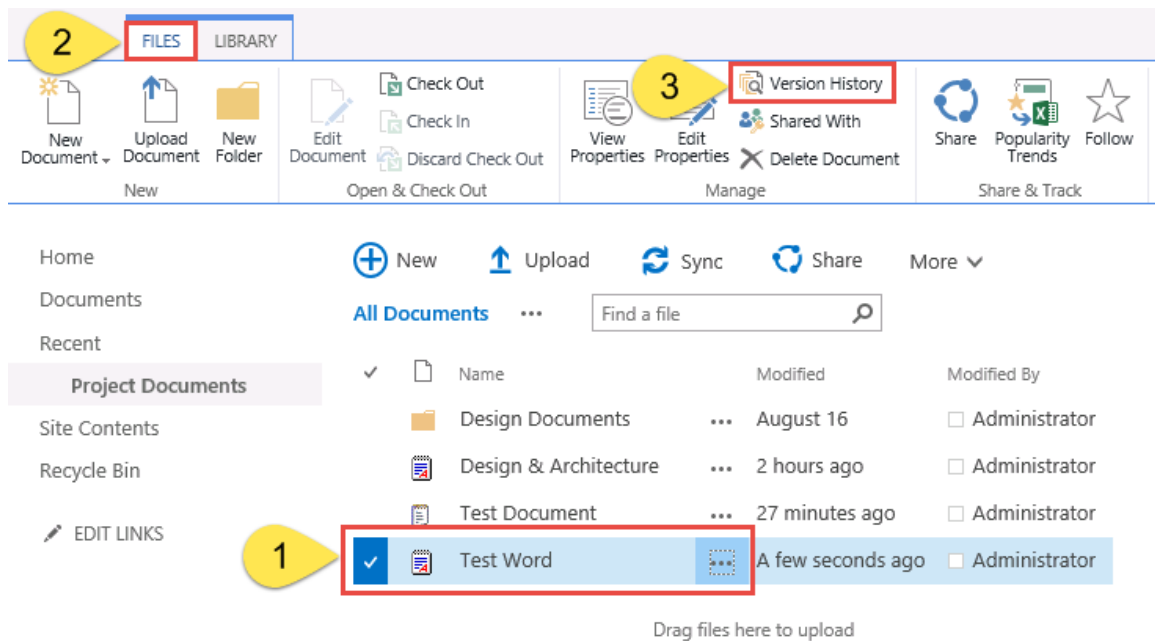


Figure 2.15.3: Version History

e) In the **Version History** page, click **Delete Minor Versions**.

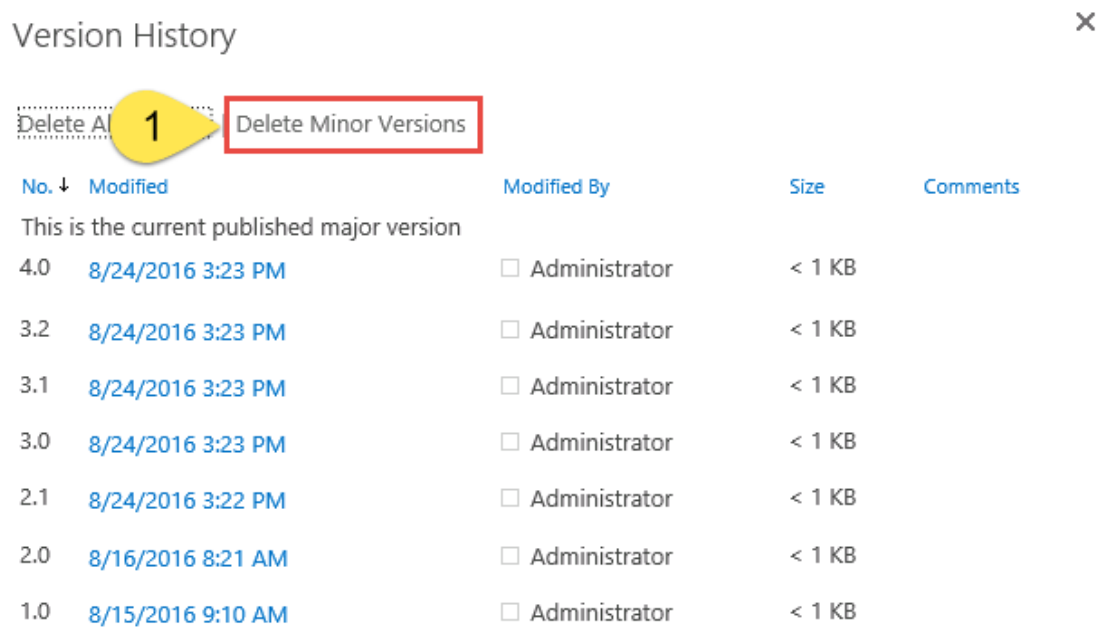


Figure 2.15.4: Version History Page

- f) Make sure you want to send all previous draft versions of this file to the site Recycle Bin by clicking **Ok** button.

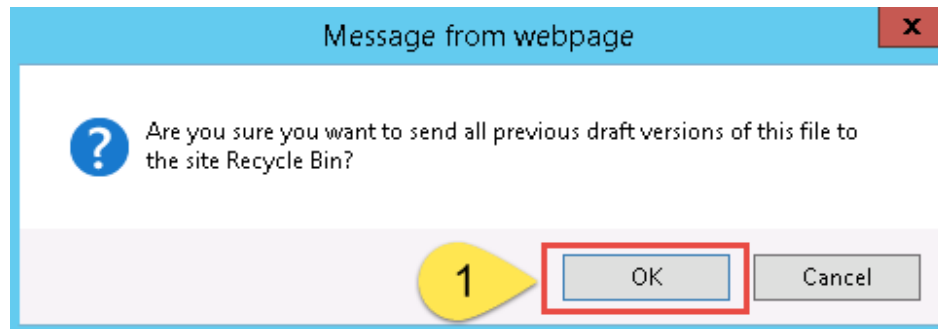


Figure 2.15.5: A Pop-up message

- g) **Alternate Option:** Select the file for which you want to delete all versions, **Open Menu Dialog** for selected item by clicking ‘...’ link next to the document. Go to **More actions** by clicking ‘...’ link. Click **Version History**.

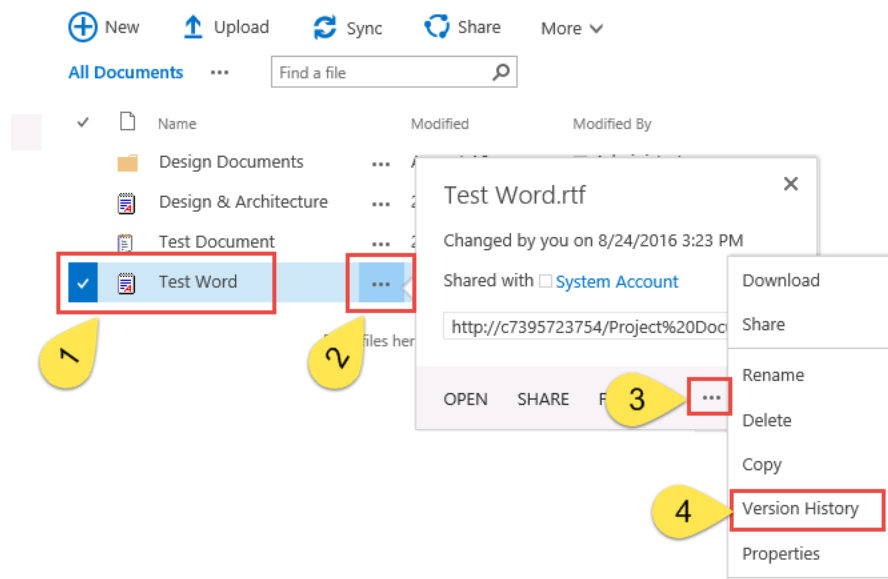


Figure 2.15.6: Version History

Result

You can see all previous draft versions are deleted in the version history page as shown in *Fig 2.15.7*. Thus, in this section, you saw how to delete minor versions for a file in SharePoint 2016 Document Library.

Version History ×

Delete All Versions | Delete Minor Versions

No. ↓	Modified	Modified By	Size	Comments
This is the current published major version				
4.0	8/24/2016 3:23 PM	<input type="checkbox"/> Administrator	< 1 KB	
3.0	8/24/2016 3:23 PM	<input type="checkbox"/> Administrator	< 1 KB	
2.0	8/16/2016 8:21 AM	<input type="checkbox"/> Administrator	< 1 KB	
1.0	8/15/2016 9:10 AM	<input type="checkbox"/> Administrator	< 1 KB	

Figure 2.15.7: Version History Page

2.16 How to publish a major version of the selected document in the document library

In this section, you will learn how to publish a major version of the selected document in SharePoint 2016 Document Library.

Publish Major Version:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

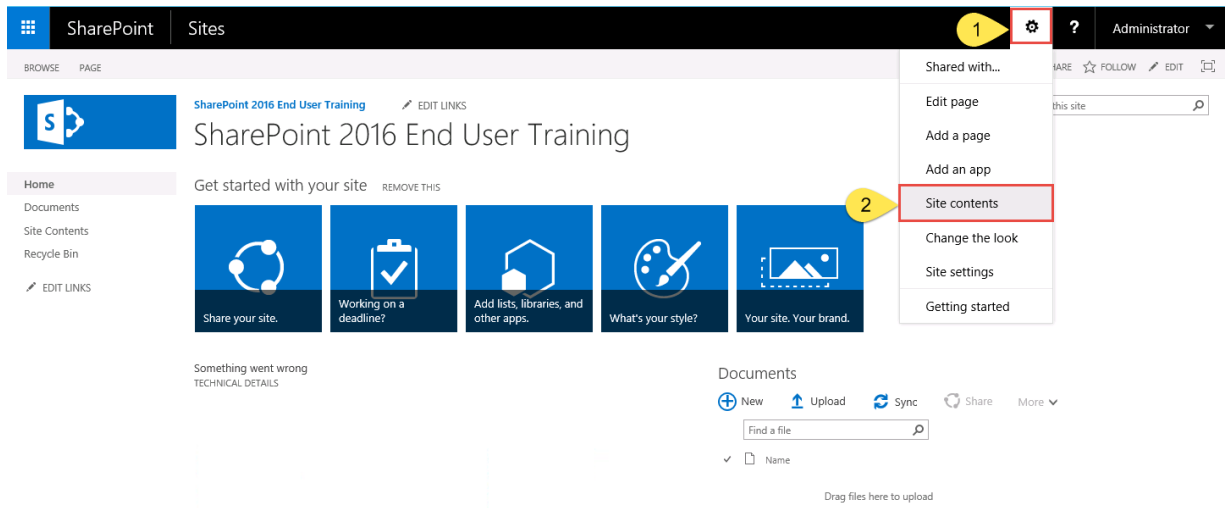


Figure 2.16.1: SharePoint 2016 Site

- c) Click **Project Documents** library which you have created in the [section 2.1](#).

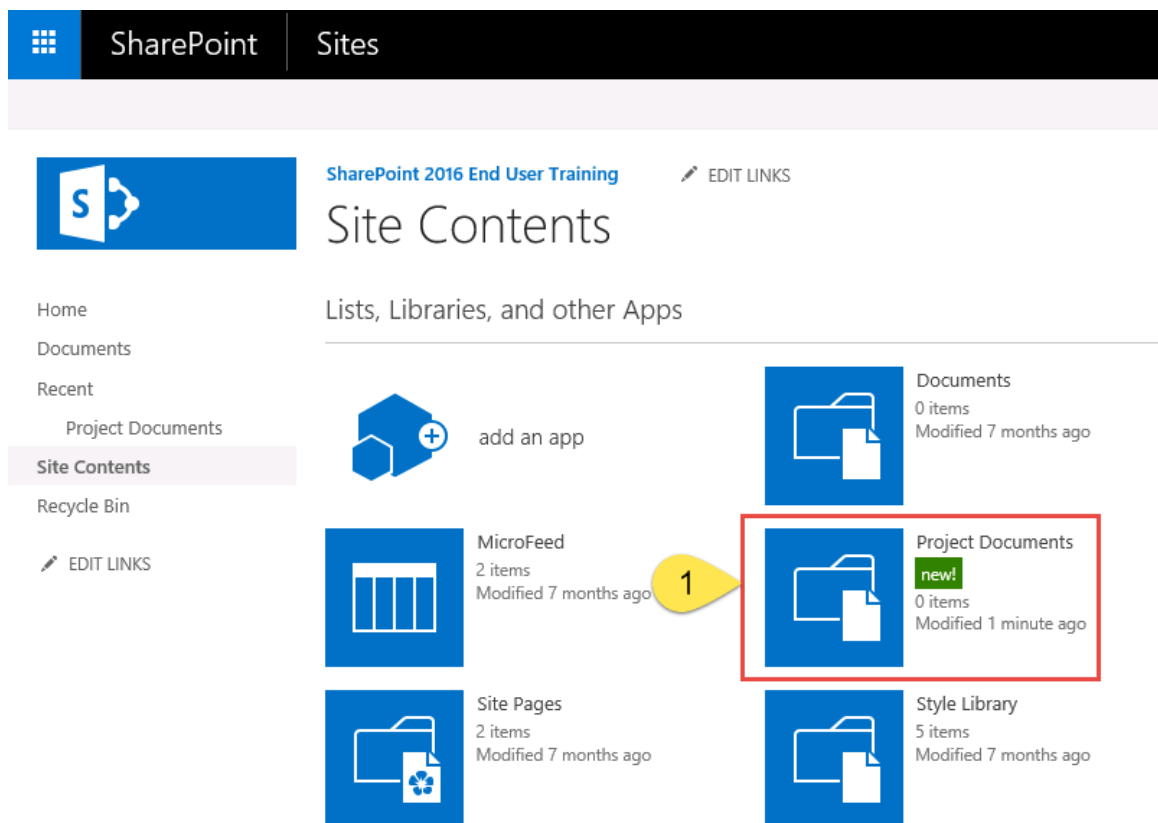


Figure 2.16.2: Site Contents Page

- d) Select the file that you want to publish as a major version, click **Files** tab in the ribbon interface and then click **Publish**.

Note: Make sure you select the document which is in the draft version or else the **Publish** button will be disabled.

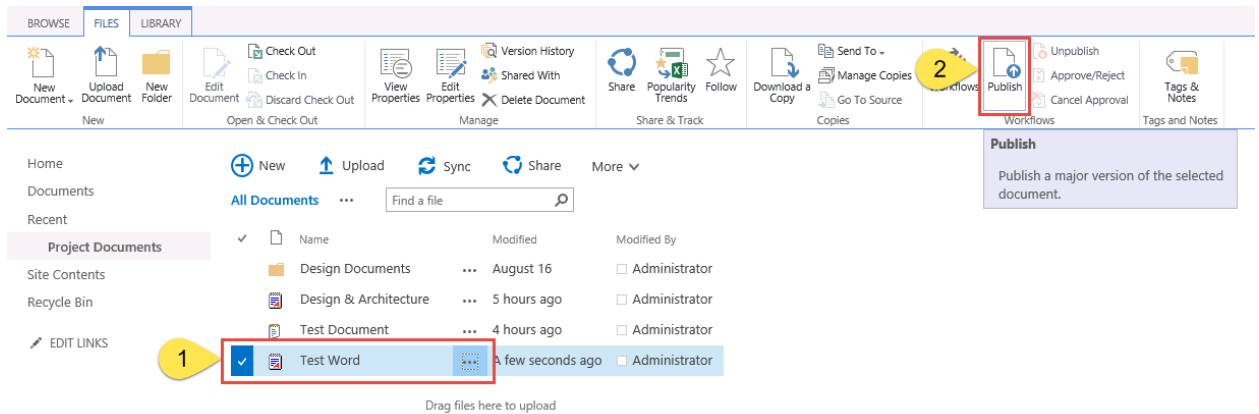


Figure 2.16.3: Publish Major Version

- e) Type comments describing what has changed in this version, click **Ok** button.



Figure 2.16.4: Publish Major Version

- f) **Alternate Option:** Select the file that you want to publish a major version, **Open Menu Dialog** for selected item by clicking '...' link next to the document. Go to **More actions** by clicking '...' link. Click **Version History** and then click **Publish a Major Version**.

Note: Make sure you select the document which is in the draft version or else you will not see “**Publish a Major Version**” option.

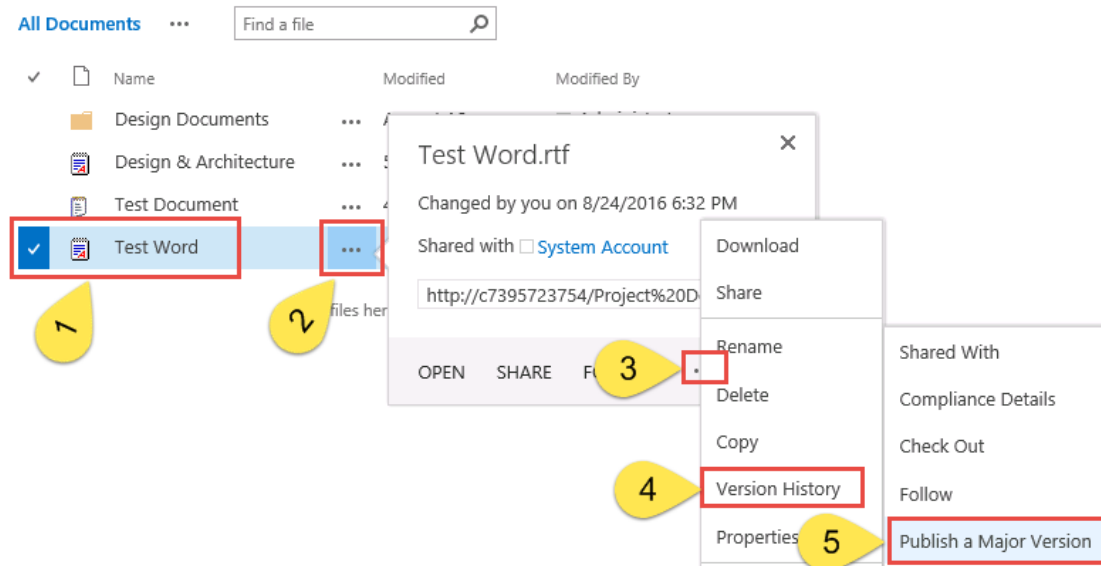


Figure 2.16.5: Publish Major Version

Result

Thus, in this section, you saw how to publish a major version of the selected file in SharePoint 2016 Document Library.

2.17 How to create a new field or column in the Document Library

In this section, you will learn how to create a new column in SharePoint 2016 Document Library.

Create Column:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

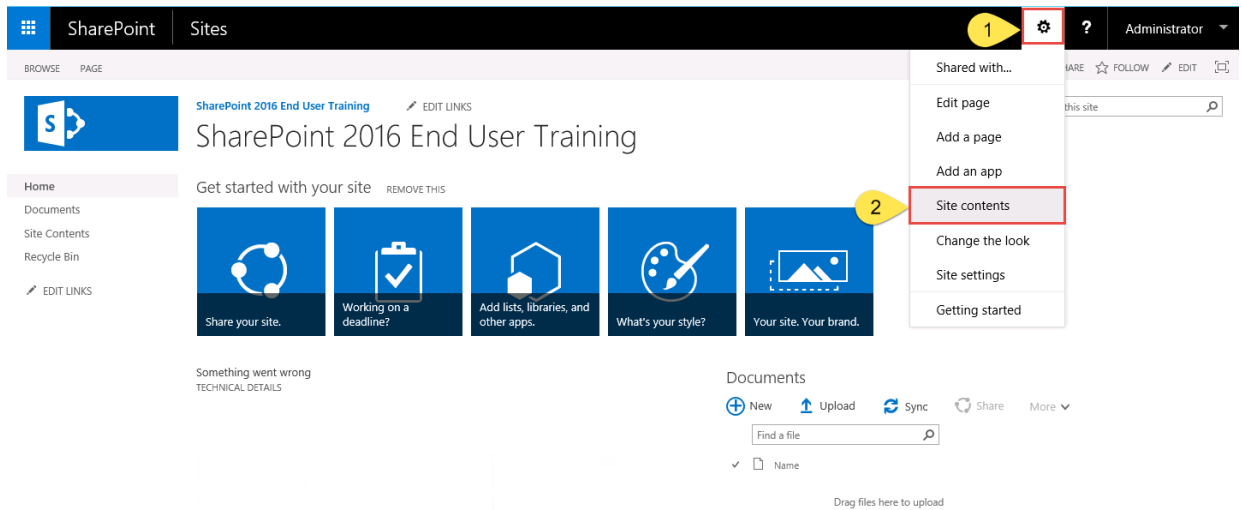


Figure 2.17.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the [section 2.1](#).

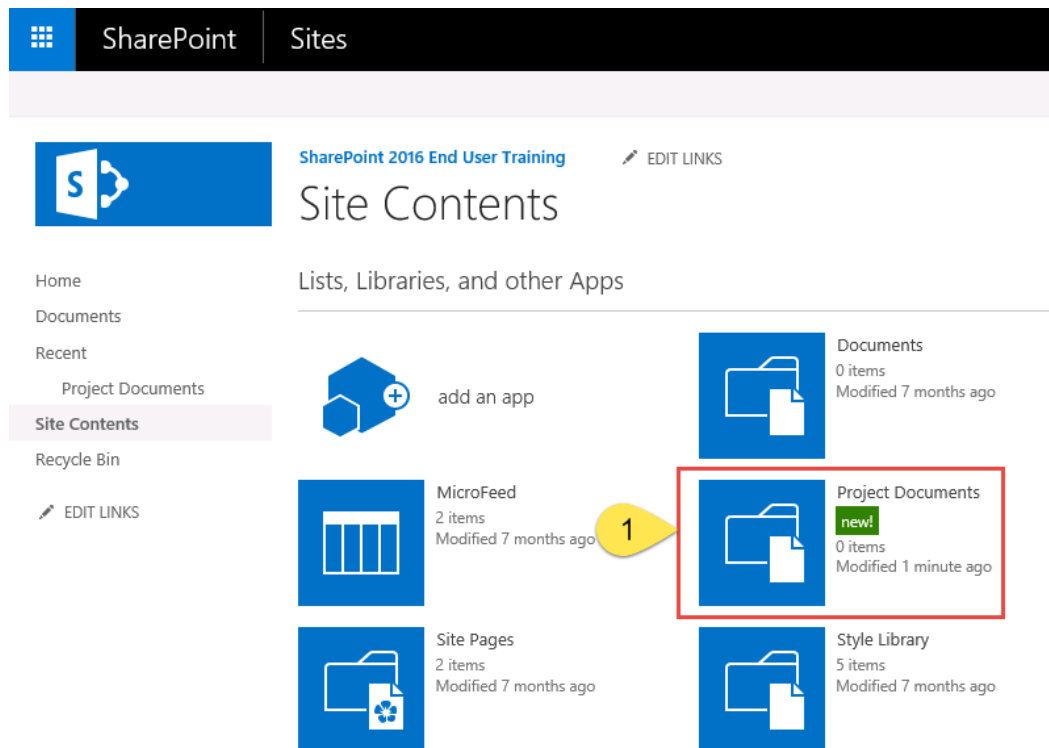


Figure 2.17.2: Site Contents Page

d) In the ribbon interface, click **Library** tab and then click **Library Settings**.

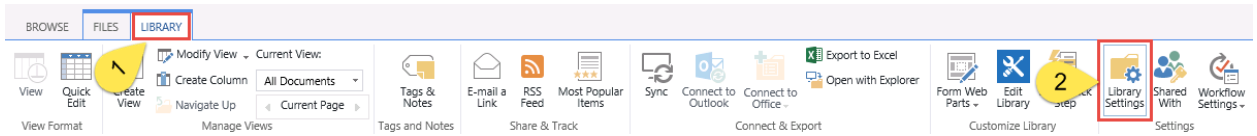


Figure 2.17.3: Library Settings

e) Under Columns section, click **Create Column**.

Columns

A column stores information about each document in the document library. The following columns are currently available in this document library:

Column (click to edit)	Type	Required
Title	Single line of text	
Created	Date and Time	
Modified	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

- ☒ Create column
- ☐ Add from existing site columns
- ☐ Column ordering
- ☐ Indexed columns

Figure 2.17.4: Settings Page

f) Enter the column name and select the type of information you want to store in the column.

Name and Type

Type a name for this column, and the type of information you want to store in the column.

1

Column name:

Text

2

The type of information in this column is:

- ☒ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ Task Outcome
- ☐ External Data
- ☐ Managed Metadata

Figure 2.17.5: Create Column

g) Specify the additional column settings and then click **Ok** button.

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

☐ Yes ☒ No

Enforce unique values:

☐ Yes ☒ No

Maximum number of characters:

255

Default value:

☒ Text ☐ Calculated Value

☒ Add to default view

Figure 2.17.6: Create Column

Result

A new column is created successfully as shown in *Fig 2.17.7*. Thus, in this section, you saw how to create a new column file in SharePoint 2016 Document Library.

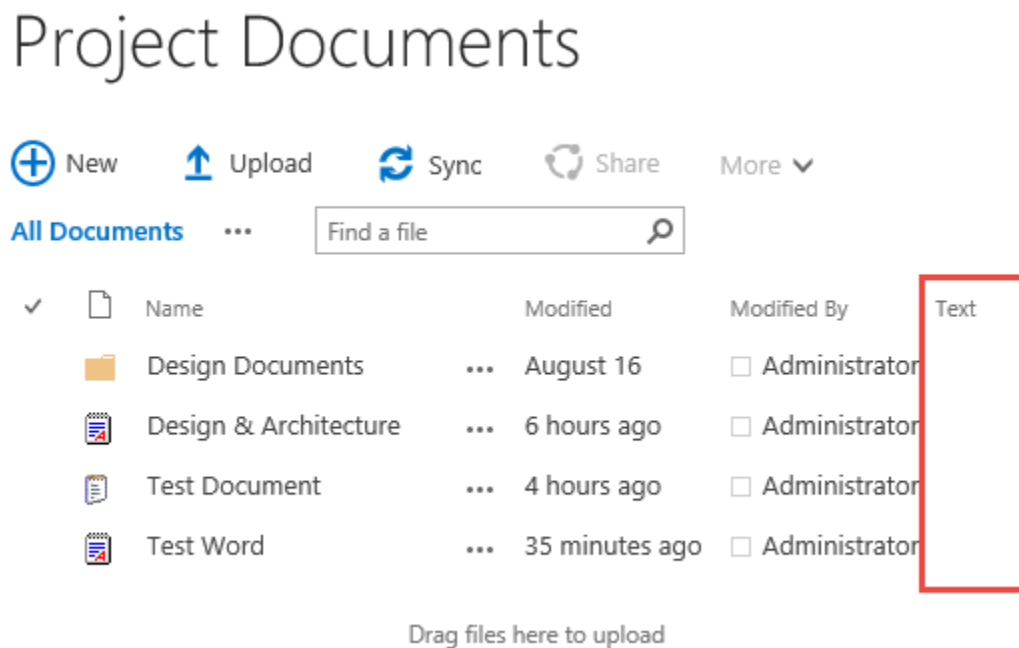


Figure 2.17.7: Column Created

2.18 How to delete the field or column in the Document Library

In this section, you will learn how to delete the field or column in SharePoint 2016 Document Library.

Delete Column:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

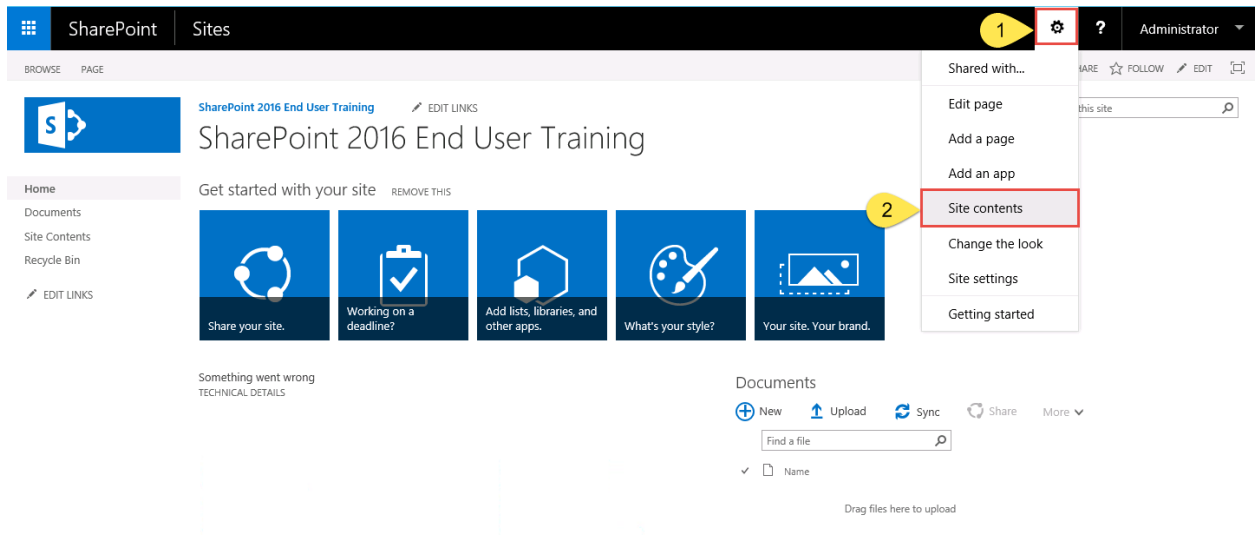


Figure 2.18.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the [section 2.1](#).

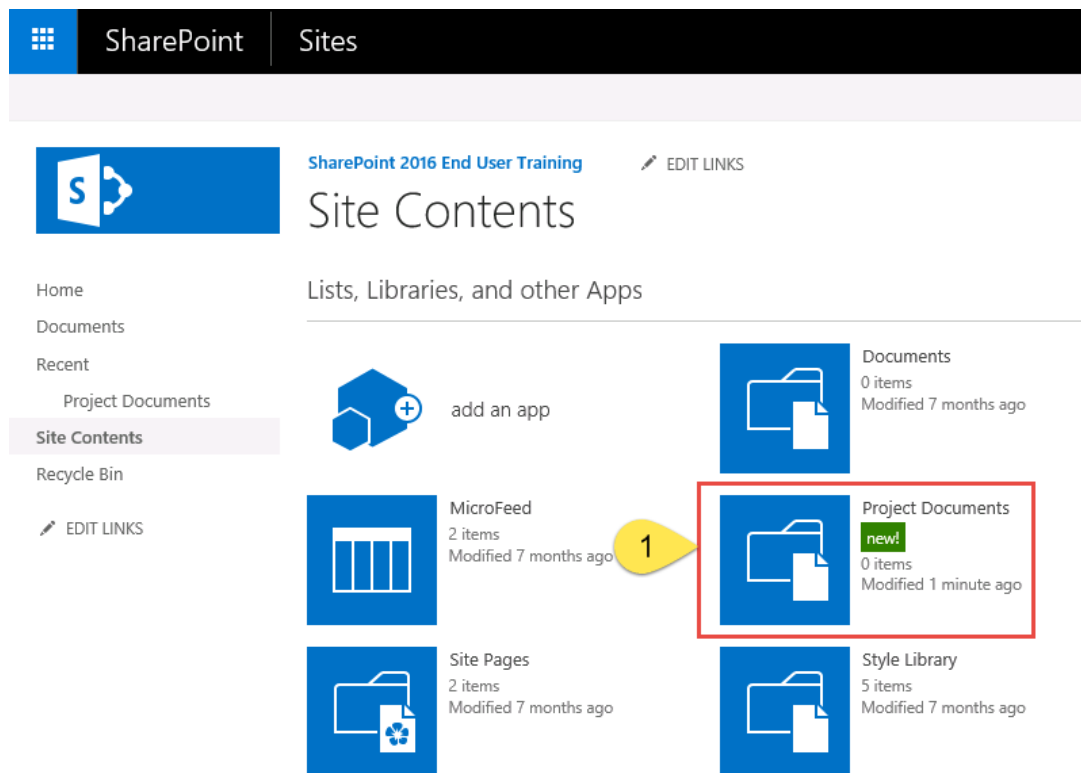


Figure 2.18.2: Site Contents Page

d) In the ribbon interface, click **Library** tab and then click **Library Settings**.

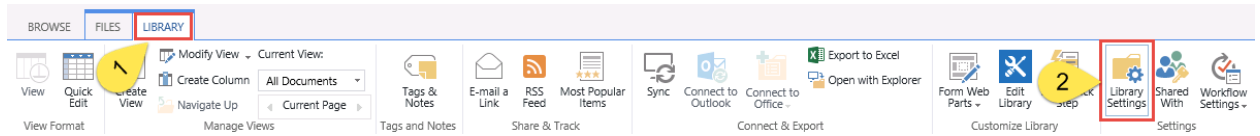


Figure 2.18.3: Library Settings

e) Under **Columns** section, click the column that you want to delete.

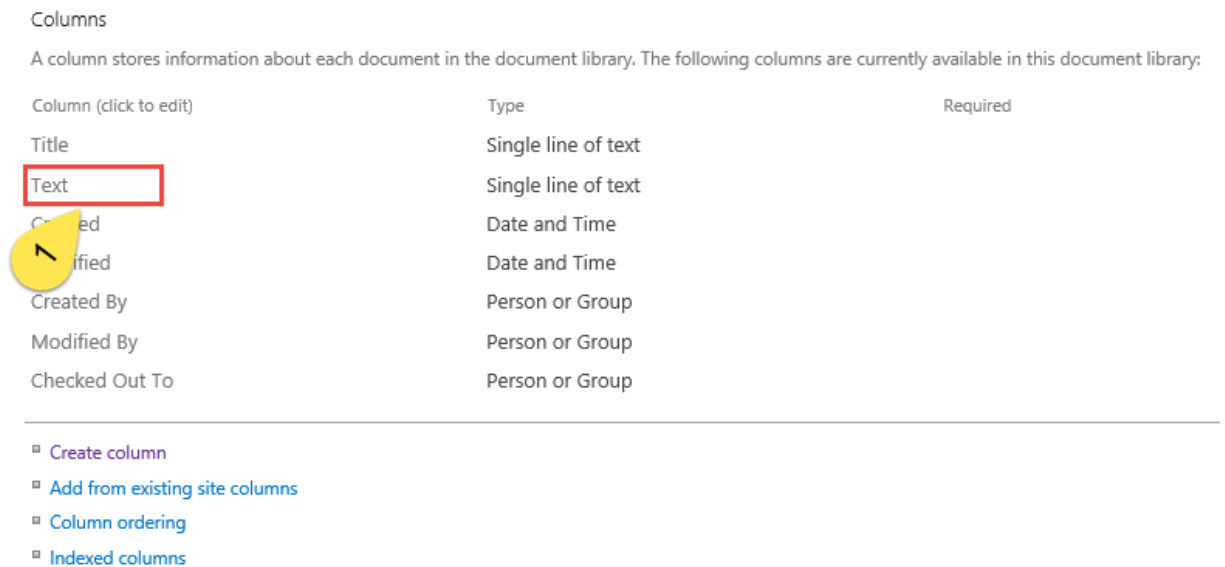


Figure 2.18.4: Settings Page

f) Click **Delete**.

Additional Column Settings
Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
☐ Yes ☒ No

Enforce unique values:
☐ Yes ☒ No

Maximum number of characters:

Default value:
☒ Text ☐ Calculated Value

[Column Validation](#)

1

Figure 2.18.5: Column Settings

Result

Thus, in this section, you saw how to delete the field or column in SharePoint 2016 Document Library.

2.19 How to create a view in the Document Library

In this section, you will learn how to create a view in SharePoint 2016 Document Library.

Create View:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

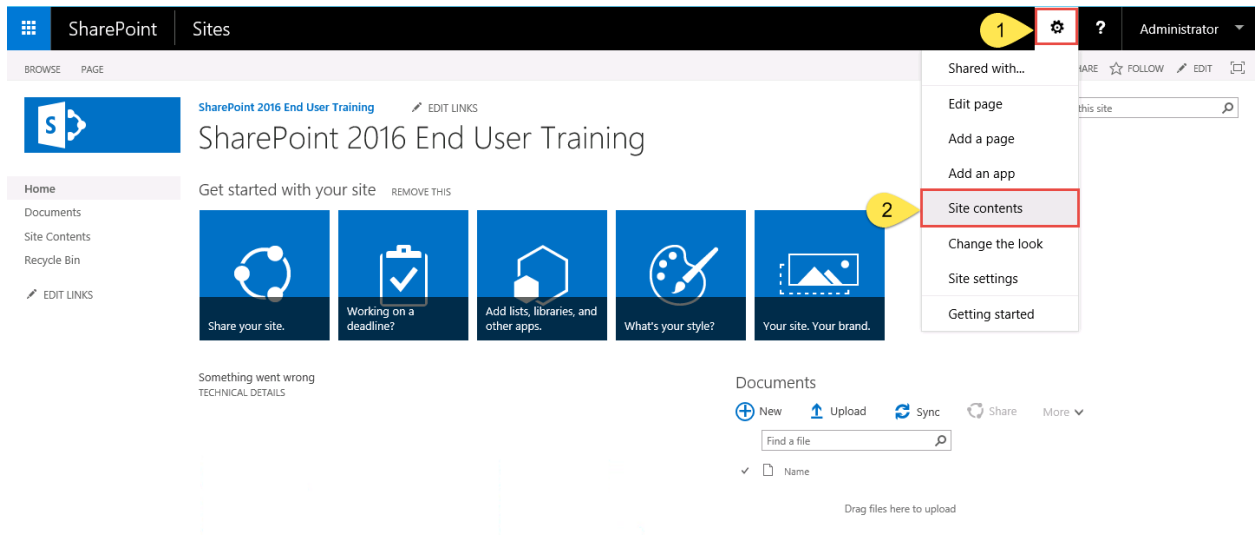


Figure 2.19.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the [section 2.1](#).

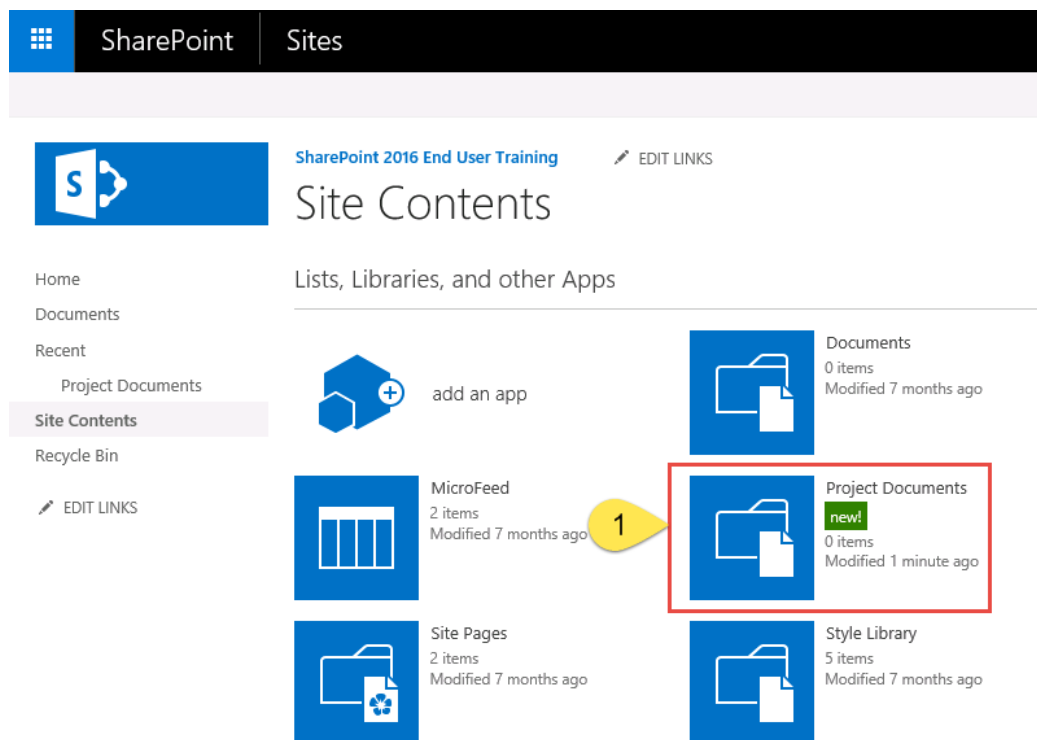


Figure 2.19.2: Site Contents Page

- d) In the ribbon interface, click **Library** tab and then click **Library Settings**.

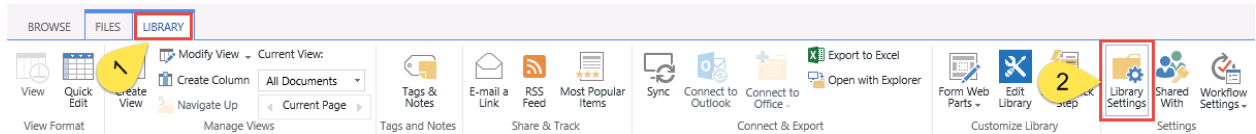


Figure 2.19.3: Library Settings

- e) Under **Views** section, click **Create View**.

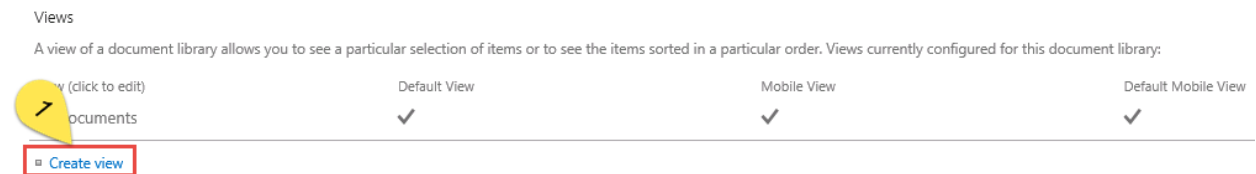


Figure 2.19.4: Settings Page

- f) Choose a view type or you can also choose from an existing view. In this example, I am going to choose **Standard View**.

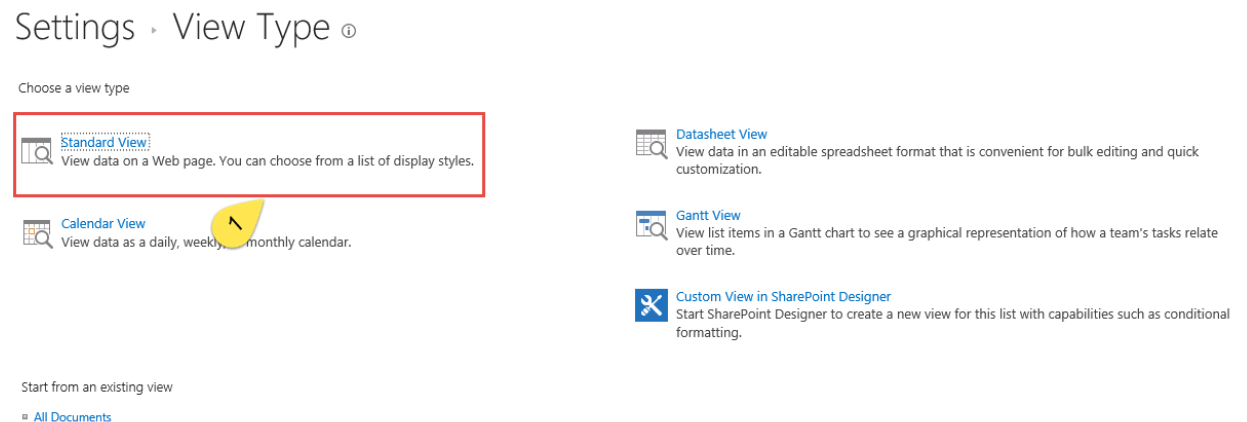


Figure 2.19.5: Create View

- g) Type a name for this view, select **Audience** for this view. Select the columns that you want to show in this view and select a number in the **Position from Left**.

Name
Type a name for this view of the document library. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:
1 Demo View

Audience
Select the option that represents the intended audience for this view.

View Audience:
2 ☒ Make this the default view (Applies to public views only)

Columns
Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.

View Audience:
3 ☐ Create a Personal View
Personal views are intended for your use only.
☒ Create a Public View
Public views can be visited by anyone using the site.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2
<input checked="" type="checkbox"/>	Modified	3
<input checked="" type="checkbox"/>	Modified By	4
<input checked="" type="checkbox"/>	Text	5
<input type="checkbox"/>	App Created By	6

4

Figure 2.19.6: Create View

h) Specify the additional view settings and then click **Ok** button.

Sort
Filter
Tabular View
Group By
Totals
Style
Folders
Item Limit
Mobile

4. Select mobile settings for this view.

☒ Enable this view for mobile access (Applies to public views only)
☐ Make this view the default view for mobile access (Applies to public views only)

Number of items to display in list view web part for this view:
3

Field to display in mobile list simple view:
Name (linked to document with edit menu)

1 OK Cancel

Figure 2.19.7: Create View

Result

You can see the newly created view in the library settings page as shown in *Fig 2.19.8*. Thus, in this section, you saw how to create a view in SharePoint 2016 Document Library.

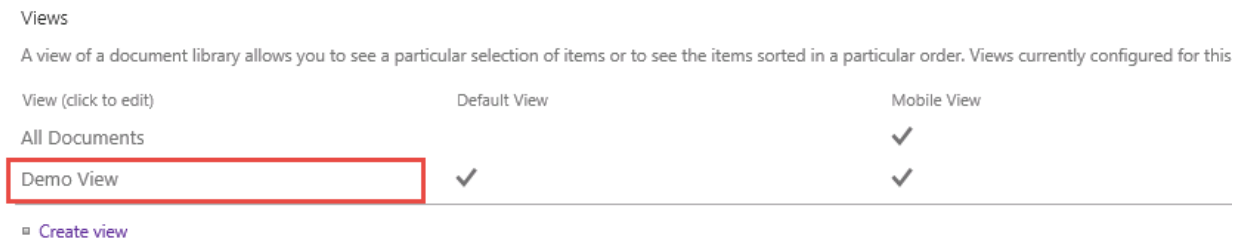


Figure 2.19.8: Library Settings Page

2.20 How to modify the view in the Document Library

In this section, you will learn how to modify the view in SharePoint 2016 Document Library.

Modify View:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

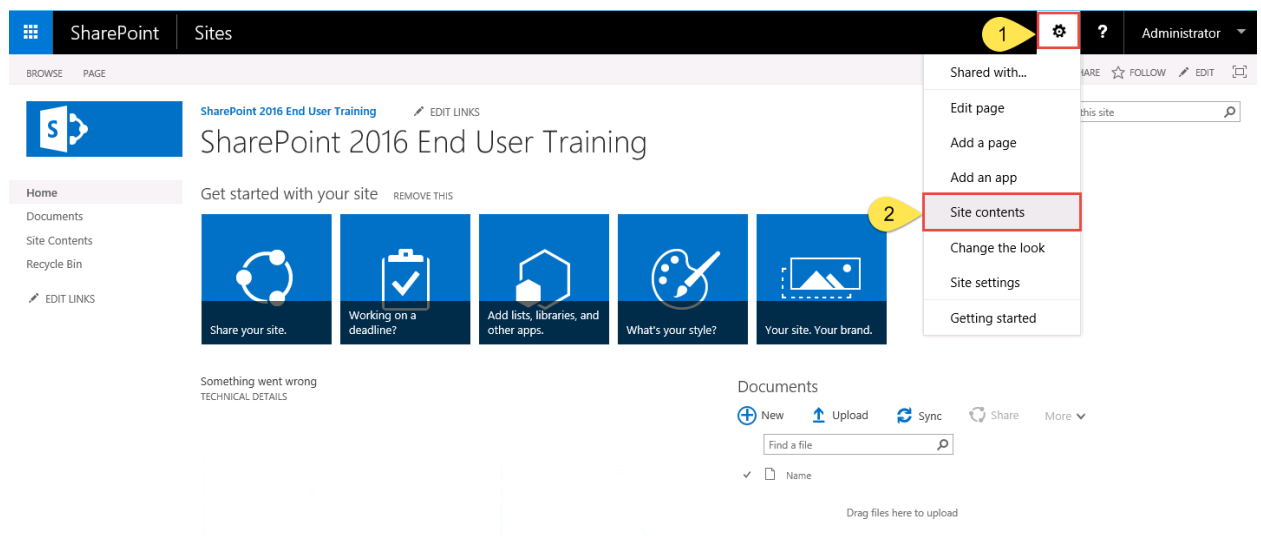


Figure 2.20.1: Sharepoint 2016 Site

c) Click **Project Documents** library which you have created in the [section 2.1](#).

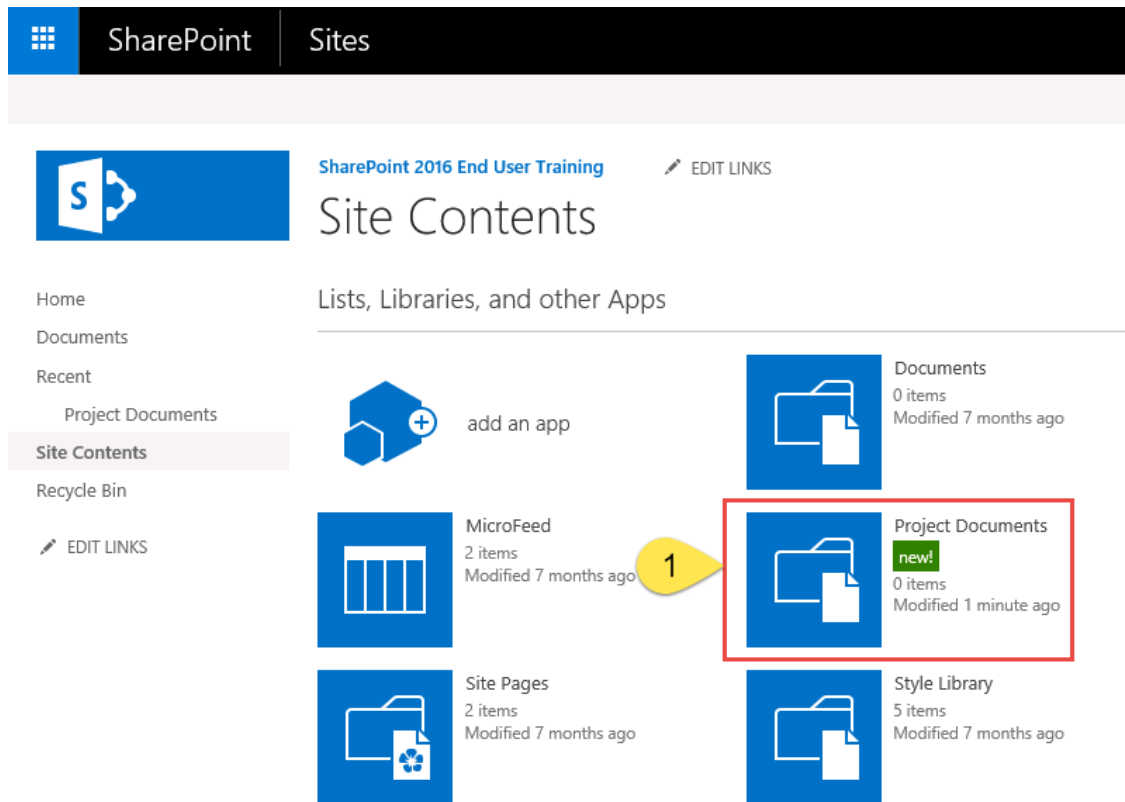


Figure 2.20.2: Site Contents Page

d) In the ribbon interface, click **Library** tab and then click **Library Settings**.

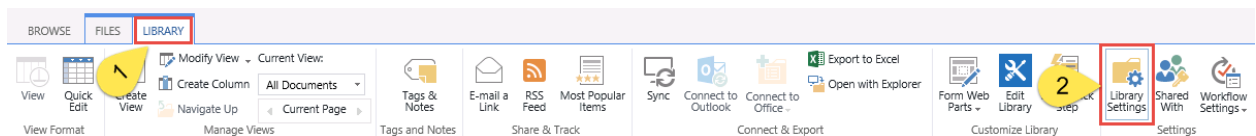


Figure 2.20.3: Library Settings

e) Under **Views** section, click the view that you want to modify.

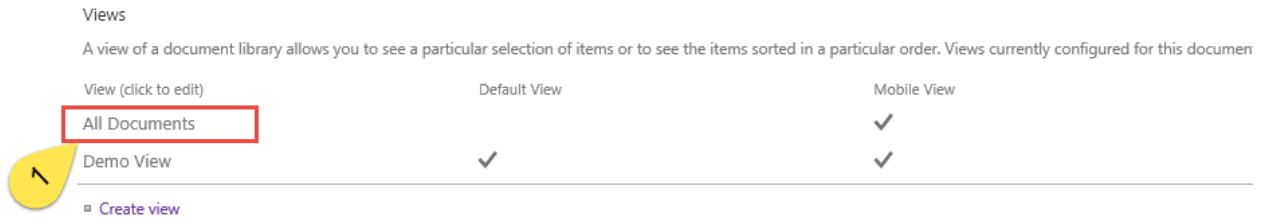


Figure 2.20.4: Library Settings Page

f) You can do the changes required to the view and then click **Ok**.

Settings ▸ Edit View ⓘ

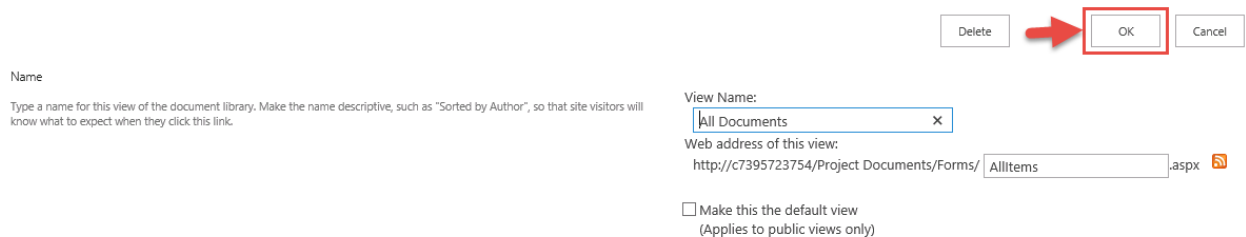


Figure 2.20.5: Edit View

Result

Thus, in this section, you saw how to modify the view in SharePoint 2016 Document Library.

2.21 How to delete the view in the Document Library

In this section, you will learn how to delete the view in SharePoint 2016 Document Library.

Modify View:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

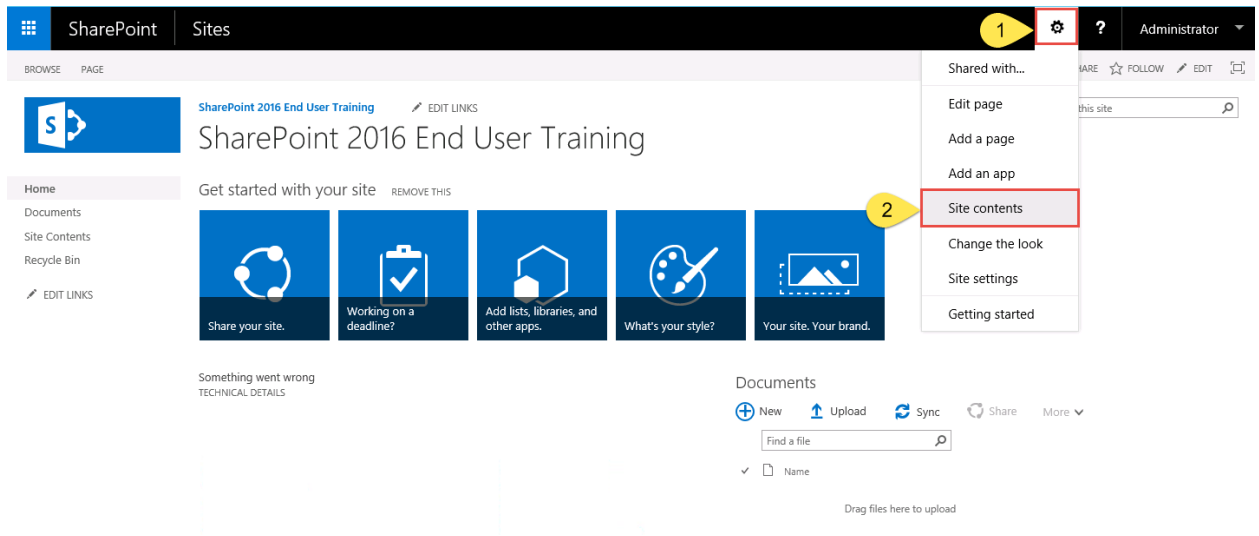


Figure 2.21.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the [section 2.1](#).

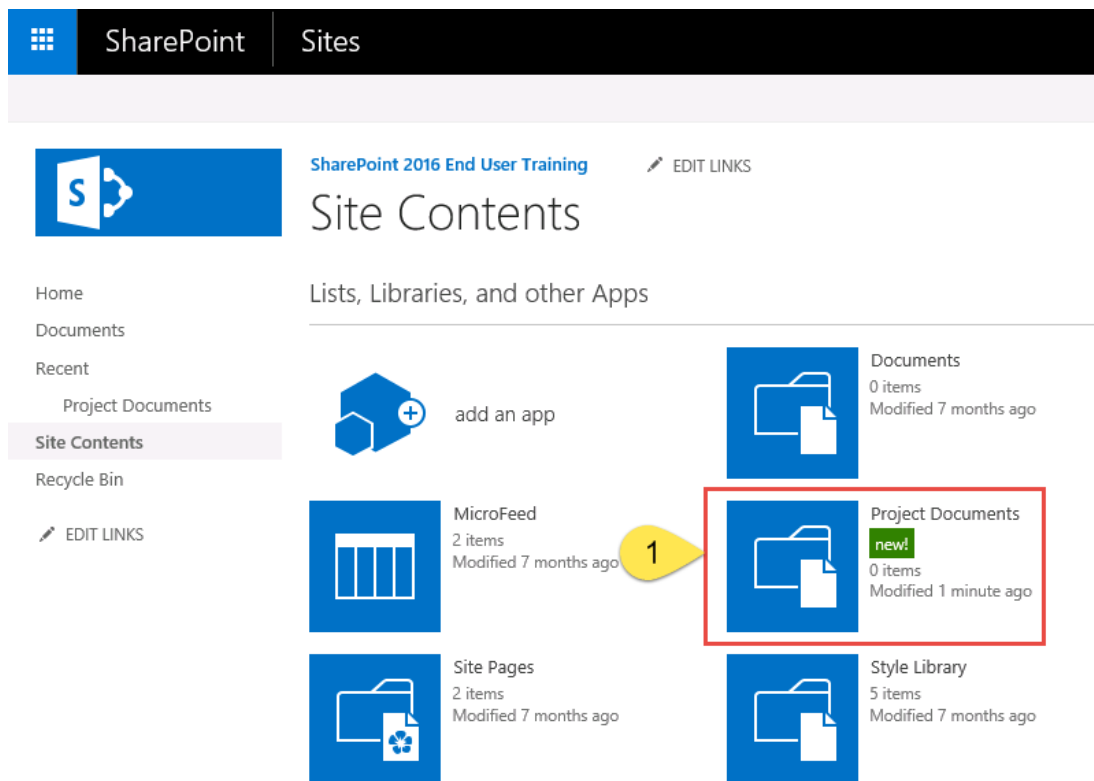


Figure 2.21.2: Site Contents Page

d) In the ribbon interface, click **Library** tab and then click **Library Settings**.

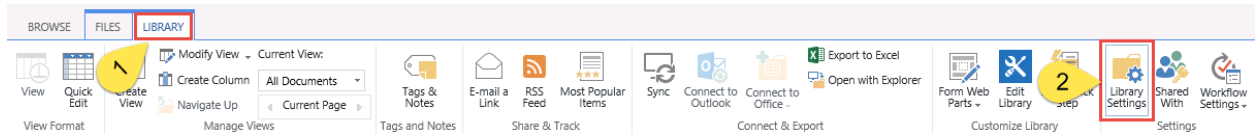


Figure 2.21.3: Library Settings

e) Under **Views** section, click the view that you want to delete.

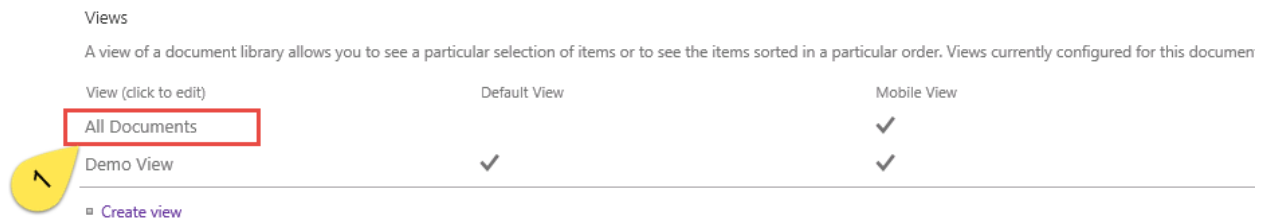


Figure 2.21.4: Library Settings Page

f) Click **Delete**. **Note:** View which has set to Default will not have **Delete**.

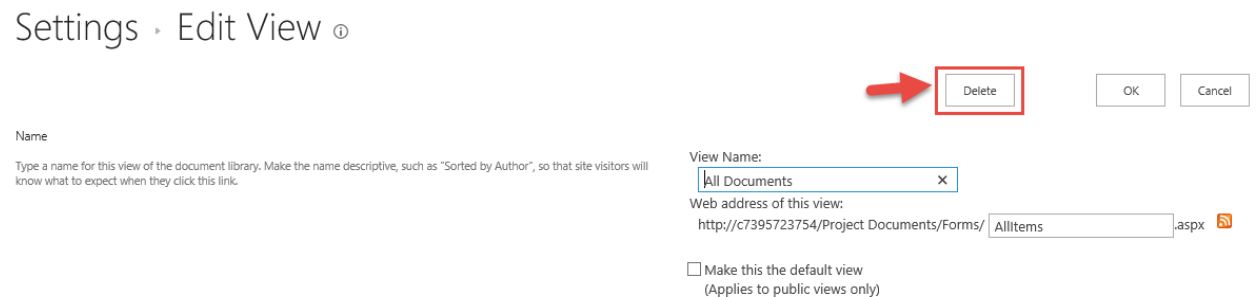


Figure 2.21.5: Delete View

Result

Thus, in this section, you saw how to delete the view in SharePoint 2016 Document Library.

2.22 How to share a file or folder in the Document Library

In this section, you will learn how to share a file or folder in SharePoint 2016 Document Library.

Share a file or folder:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

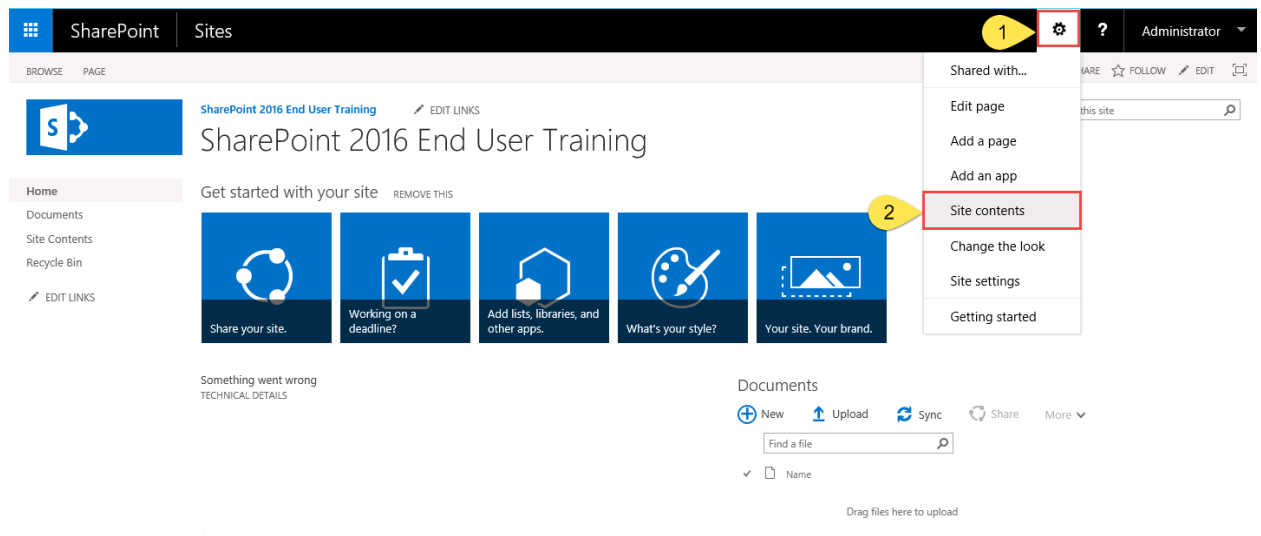


Figure 2.22.1: SharePoint 2016 Site

- Click **Project Documents** library which you have created in the section 2.1.

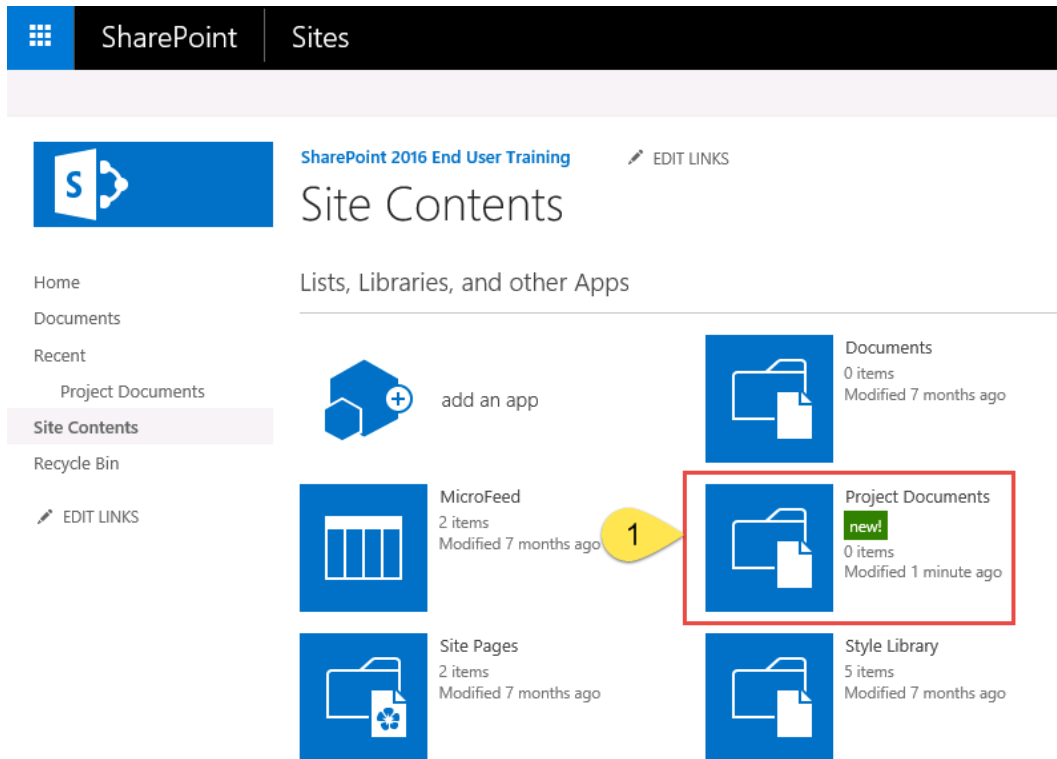


Figure 2.22.2: Site Contents Page

d) Select the file or folder which you want to share, click **Share** as shown in Fig 2.22.3.

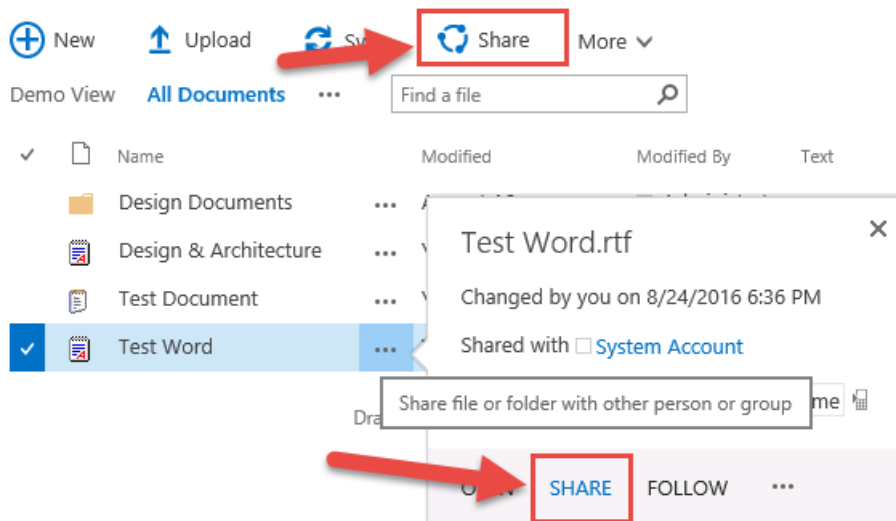


Figure 2.22.3: Share a file

- e) Enter names or email addresses and you can select the permissions as shown in *Fig 2.22.4*. Click **Share**.

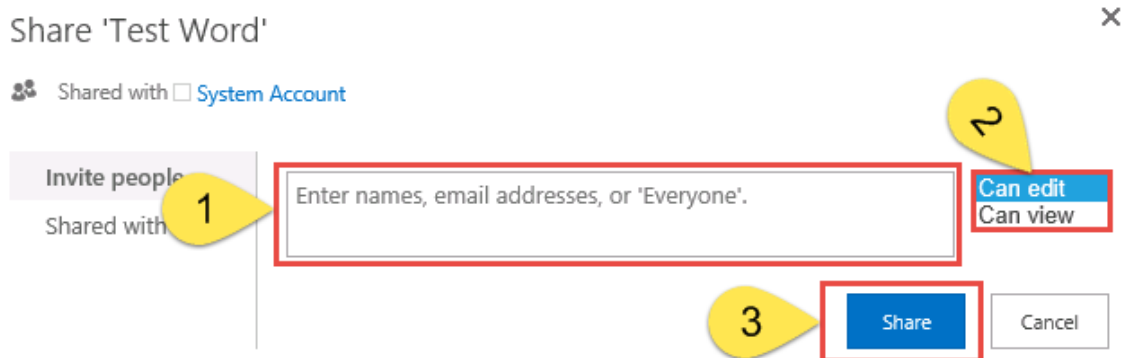


Figure 2.22.4: Share a file

Result

File is shared successfully as shown in *Fig 2.22.5*. Thus, in this section, you saw how to share a file or folder in SharePoint 2016 Document Library.

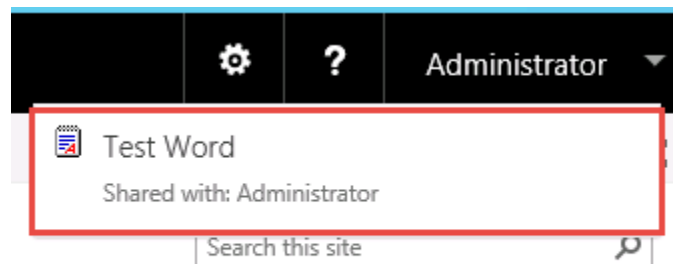


Figure 2.22.5: File Shared successfully

2.23 How to manage permissions for the Document Library

In this section, you will learn how to manage permissions in SharePoint 2016 Document Library.

Manage Permissions:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

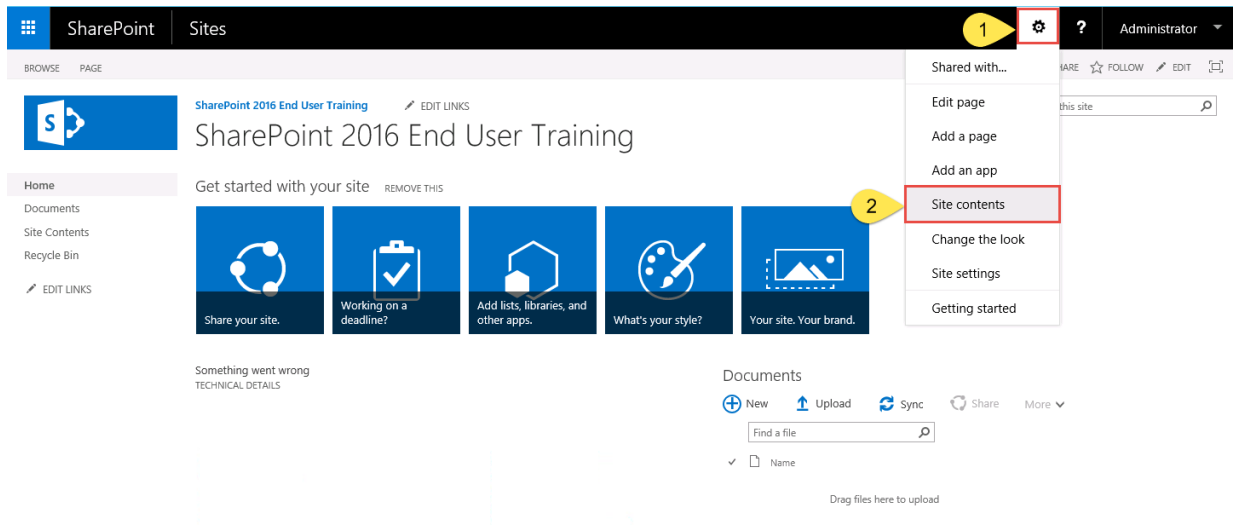


Figure 2.23.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the section 2.1.

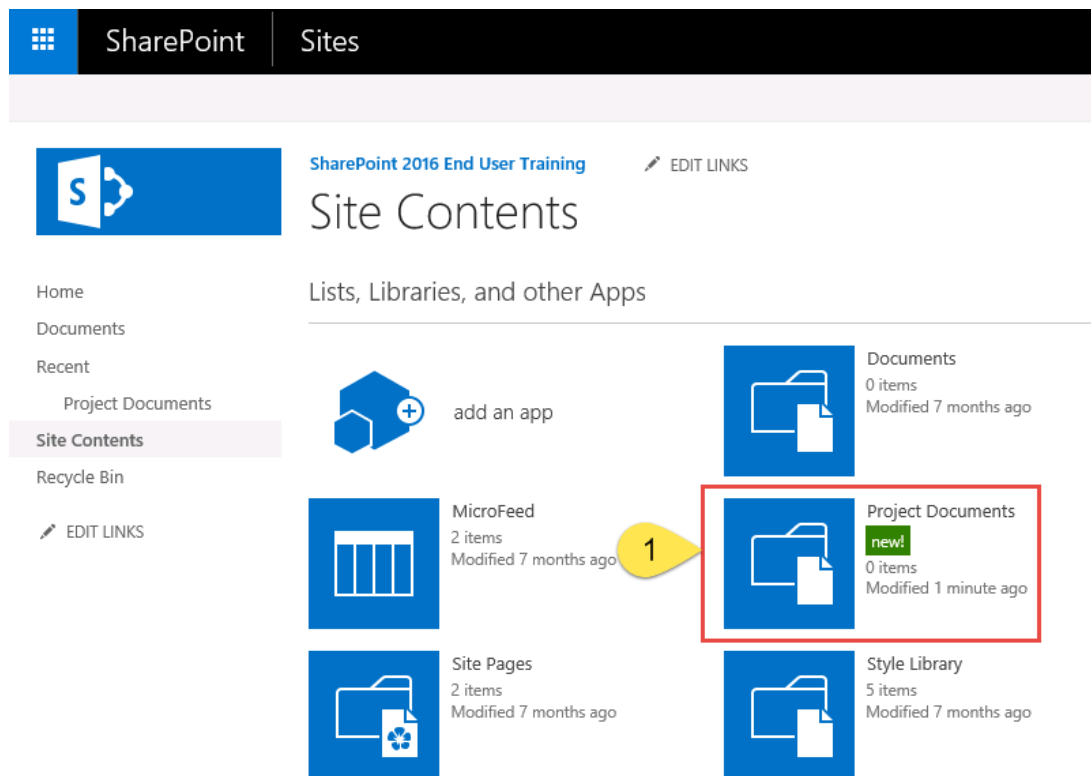


Figure 2.23.2: Site Contents Page

d) In the ribbon interface, click **Library** tab and then click **Library Settings**.

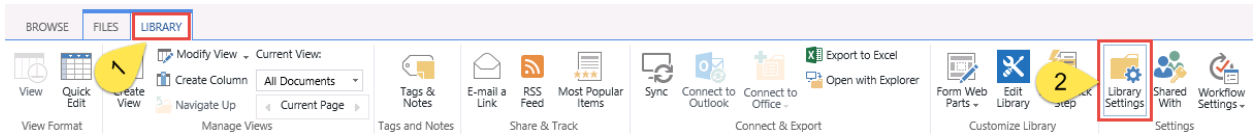


Figure 2.23.3: Library Settings

e) In the **Settings** page, click **Permissions** for this document library under **Permissions and Management** section.

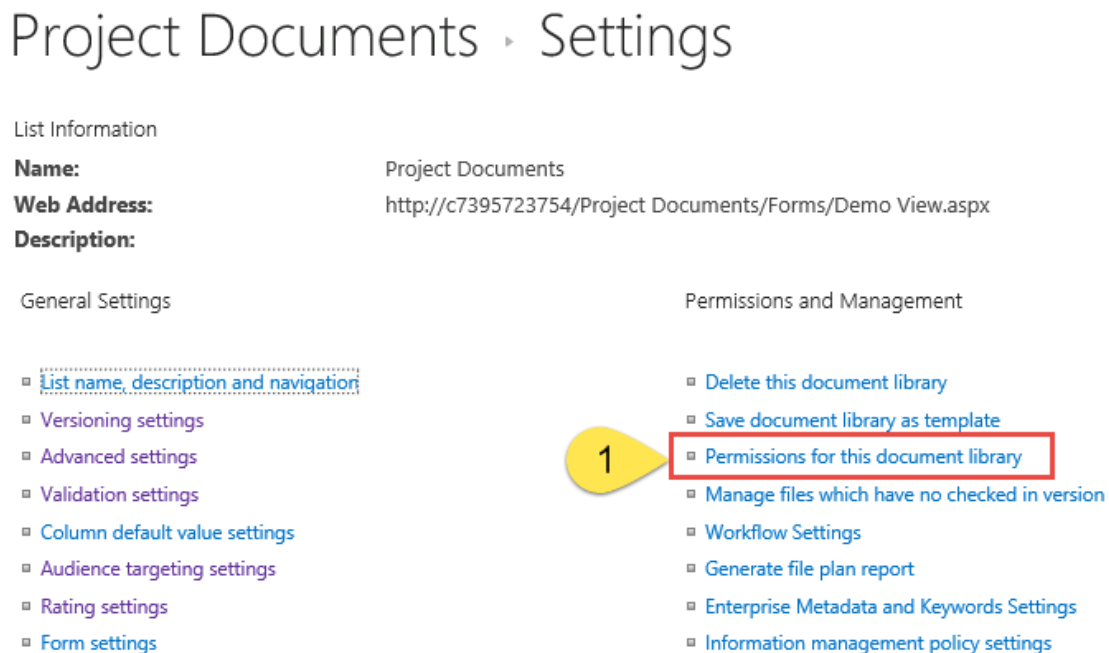


Figure 2.23.4: Library Settings Page

f) By default, you can see the permissions are inherited from its parent as shown in Fig 2.23.5.

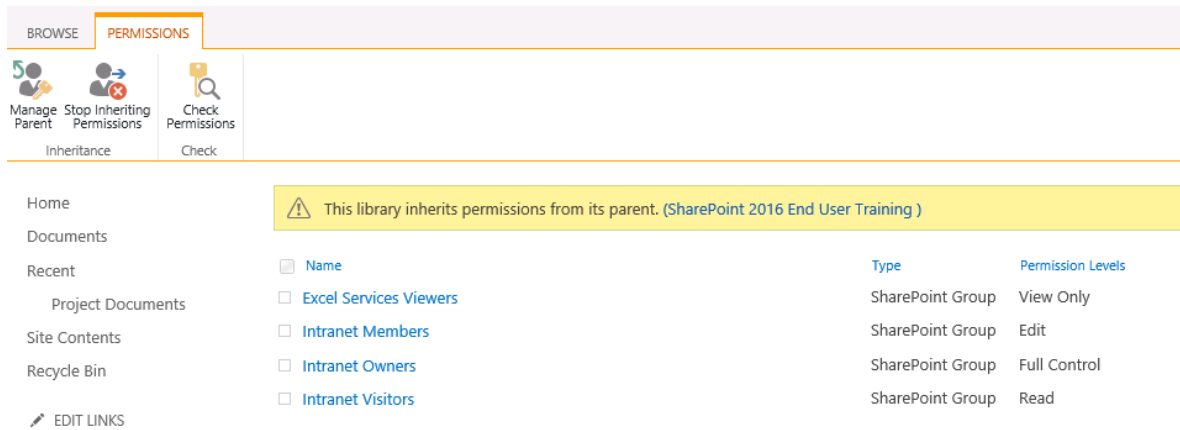


Figure 2.23.5: Library Permissions

- g) You can have a scenario in which you need to share a document library only to specific people or group. In that case, you can stop inheriting permissions from its parent and provide unique permissions to the document library. Click **Stop Inheriting Permissions** in the ribbon interface.

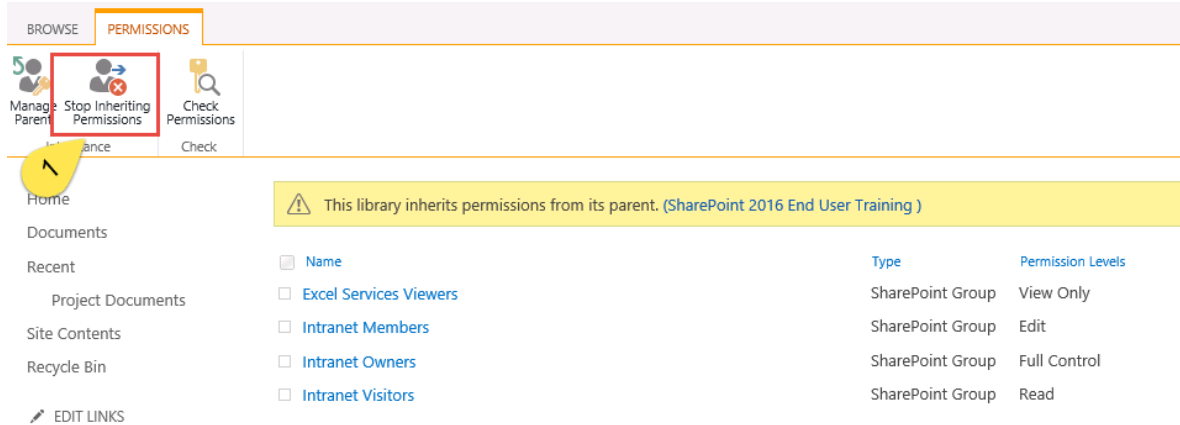


Figure 2.23.6: Library Permissions

- h) A message will pop up, click **Ok** button.



Figure 2.23.7: A Pop-up message

- i) Once you stop inheriting permissions, you can Grant/Edit/Remove user permissions for this document library.

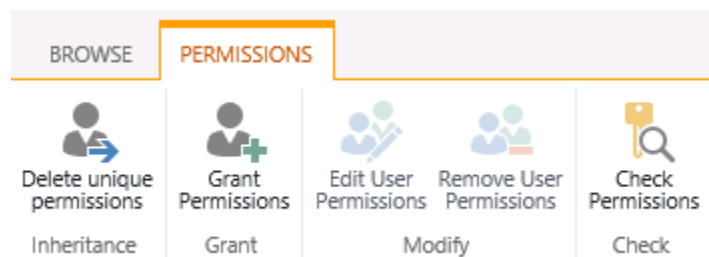


Figure 2.23.8: Permissions

- j) You can see Edit/Remove user permissions button enabled only when the user or group is selected.

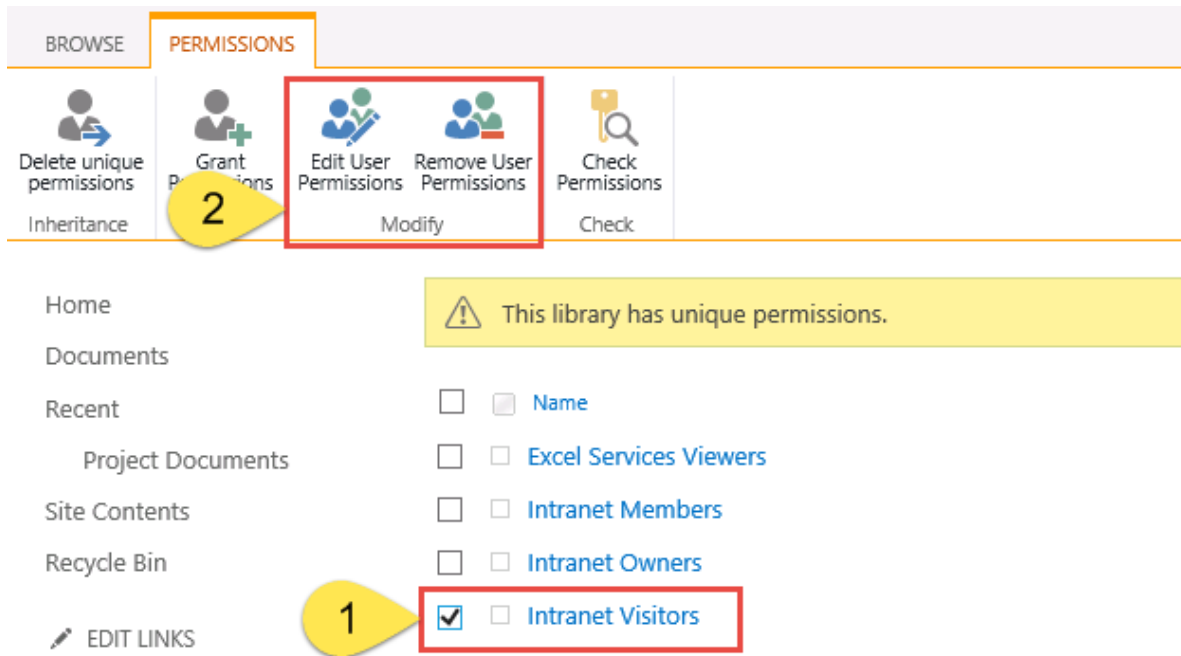


Figure 2.23.9: Permissions Page

- k) You can delete unique permissions for the document library by clicking **Delete unique permissions** in the ribbon interface.

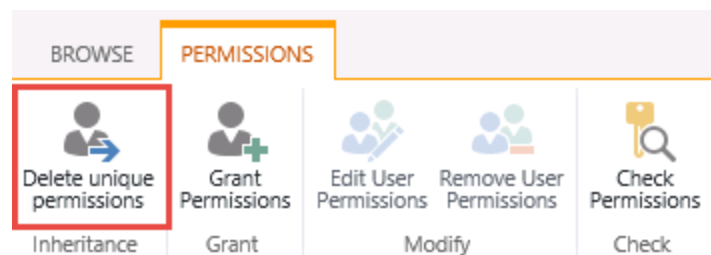


Figure 2.23.10: Delete unique permissions

Result

Thus, in this section, you saw how to manage permissions for the document library in SharePoint 2016.

2.24 How to save document library as template

In this section, you will learn how to save document library as template in SharePoint 2016.

Save Document Library as Template:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

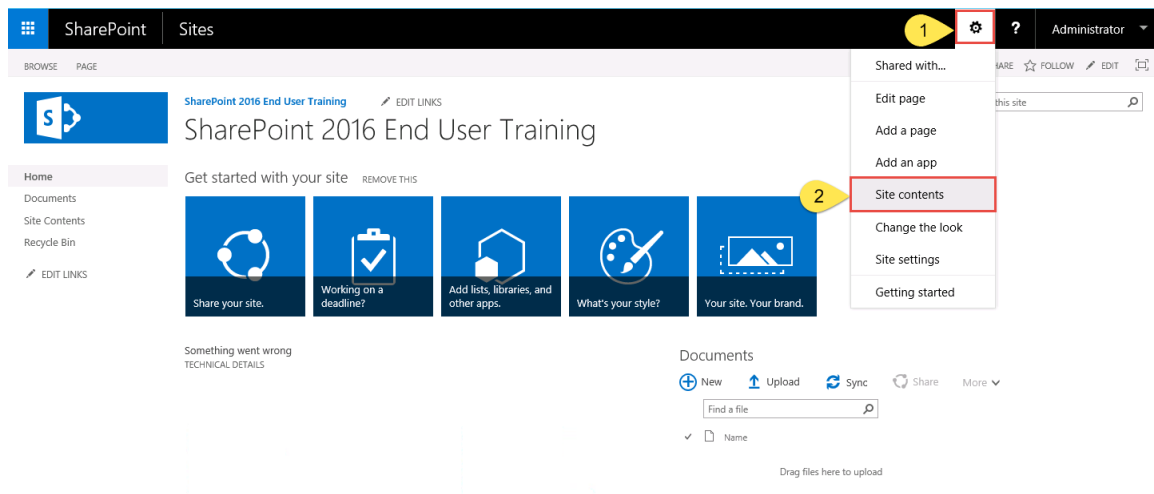


Figure 2.24.1: SharePoint 2016 Site

- Click **Project Documents** library which you have created in the section 2.1.

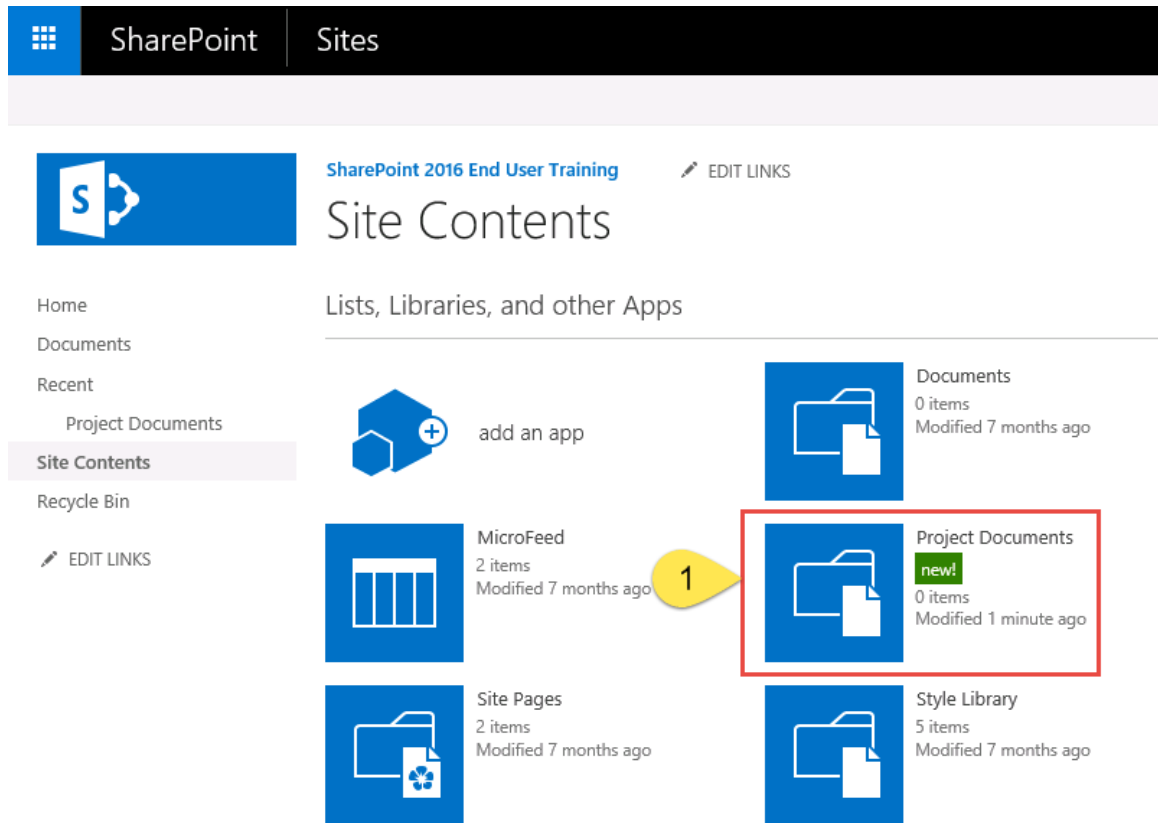


Figure 2.24.2: Site Contents Page

d) In the ribbon interface, click **Library** tab and then click **Library Settings**.

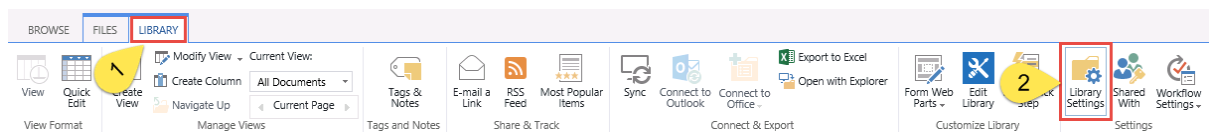


Figure 2.24.3: Library Settings

e) In the **Settings** page, click **Save document library as template** under **Permissions and Management** section.

Project Documents ▸ Settings

List Information

Name: Project Documents
Web Address: http://c7395723754/Project Documents/Forms/Demo View.aspx
Description:

General Settings

- ▣ [List name, description and navigation](#)
- ▣ [Versioning settings](#)
- ▣ [Advanced settings](#)
- ▣ [Validation settings](#)
- ▣ [Column default value settings](#)
- ▣ [Audience targeting settings](#)
- ▣ [Rating settings](#)
- ▣ [Form settings](#)

Permissions and Management

- ▣ [Delete this document library](#)
- ▣ [Save document library as template](#)
- ▣ [Permissions for this document library](#)
- ▣ [Manage files which have no checked in version](#)
- ▣ [Workflow Settings](#)
- ▣ [Generate file plan report](#)
- ▣ [Enterprise Metadata and Keywords Settings](#)
- ▣ [Information management policy settings](#)

1

Figure 2.24.4: Settings Page

- f) Enter the file name, template name and description. If you need to include content select **“Include Content”** checkbox. Click **Ok**.

Settings ▸ Save as Template ⓘ

File Name

Enter the name for this template file.

File name:

Project Documents Template

1

Name and Description

The name and description of this template will be displayed on the Create page.

Template name:

Project Documents Template

Template description:

Project Documents Template

2

Include Content

Include content in your template if you want new document library created from this template to include the items in this document library. Including content can increase the size of your template.

☐ Include Content

3

Caution: Item security is not maintained in a template. If you have private content in this document library, enabling this option is not recommended.

4

OK

Cancel

Figure 2.24.5: Save as template

Result

You have successfully saved the document library as template and you can use this template to create a new document library with the same structure. By this way, you can reduce lot of manual effort. You can also download the stp file from the list templates gallery (Site Settings => Web Designer Galleries => List Templates) and upload it in other sites. If there are any lookup columns, make sure you have that list created in the site. Thus, in this section, you saw how to save document library as template in SharePoint 2016.

SharePoint 2016 End User Training › Operation Completed Successfully

The template has successfully been saved to the list template gallery. You can now create lists based on this template.

To manage templates in the gallery, go to the [list template gallery](#).

To return to the list customization page, click **OK**.

OK

Figure 2.24.6: Template saved successfully

2.25 How to create a document library based on the saved template

In this section, you will learn how to create a Document Library based on the saved template in SharePoint 2016.

Create a Document Library:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

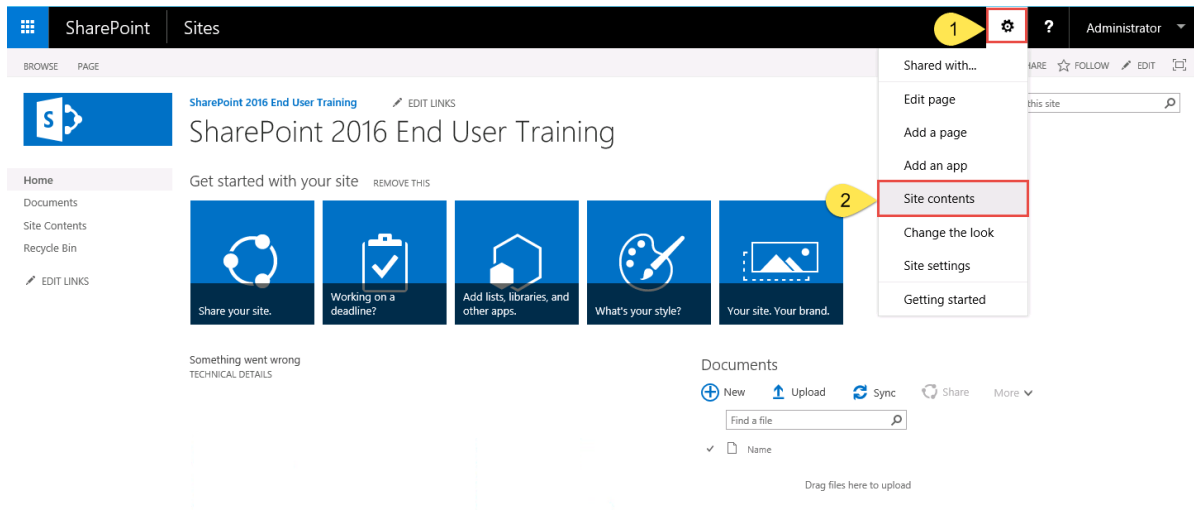


Figure 2.25.1: SharePoint 2016 Site

c) In the **Site Contents** page, click **add an app**.

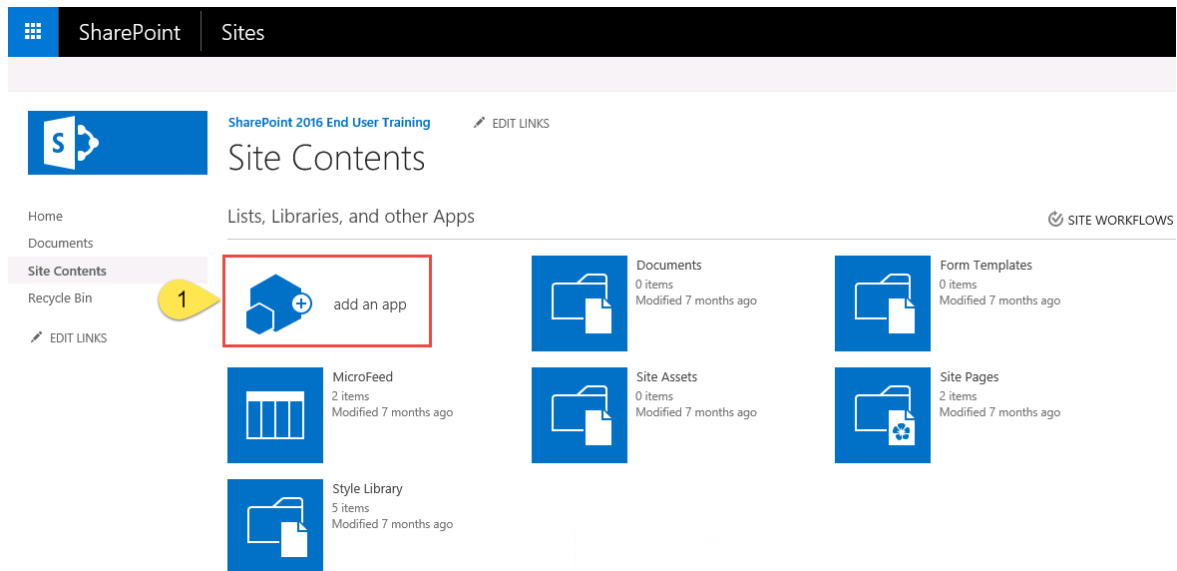


Figure 2.25.2: Site Contents Page

d) In the **Your Apps** page, search for the saved template which you have created in section 2.24. Click on **Project Documents Template**.

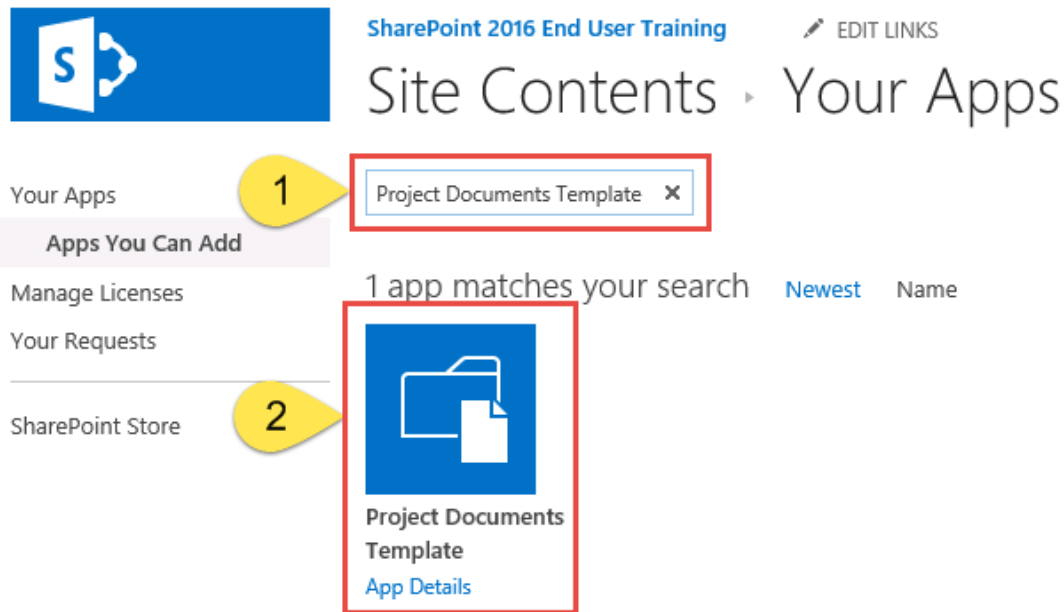


Figure 2.25.3: Search for the app

- e) In the **Adding Document Library** dialog page, enter the name for the new document library and then click **Create** button.

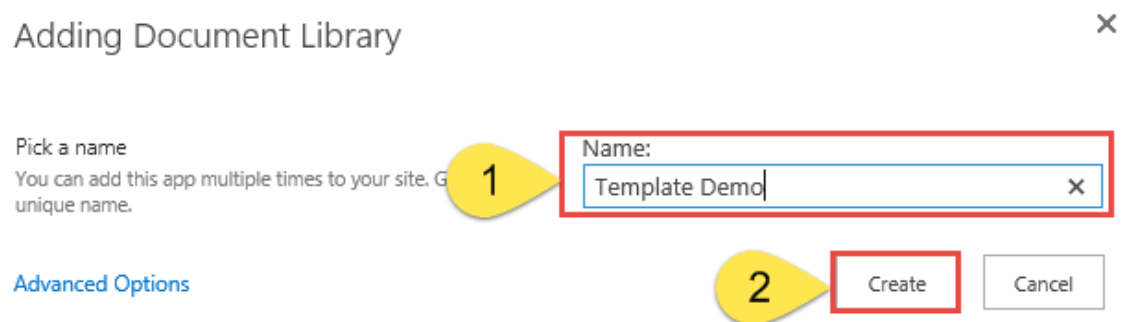


Figure 2.25.4: Adding document library

- f) A new Document Library is created successfully with the same structure as the template and you can see the new document library in the **Site Contents** Page as well in the left navigation.

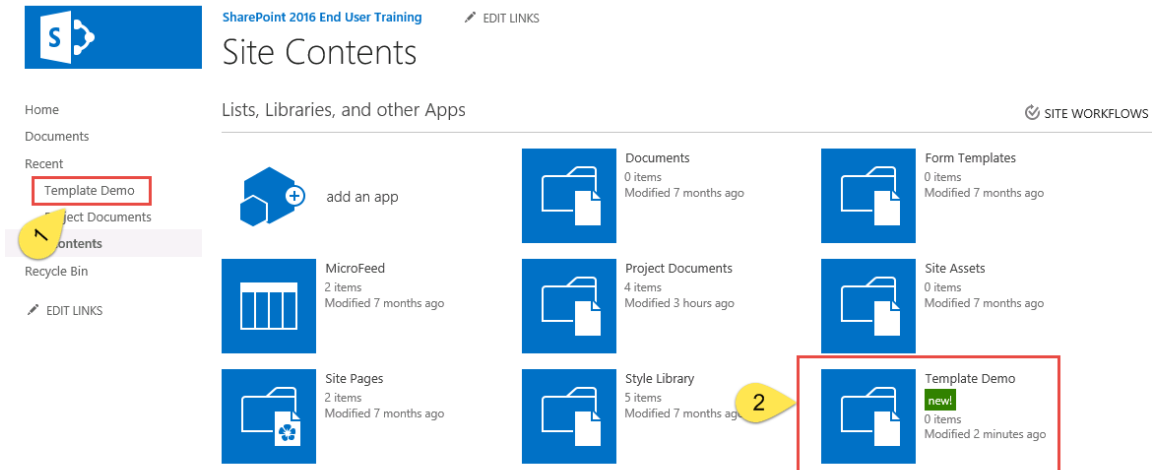


Figure 2.25.5: New document library created

Result

Thus, in this section, you saw how to create a document library based on the saved template in SharePoint 2016.

2.26 How to Delete the Document Library

In this section, you will learn how to delete the document library in SharePoint 2016.

Delete Document Library:

- Navigate to SharePoint 2016 Team Site - <http://c7395723754/>.
- In the top right corner, click **Settings** icon and then click **Site Contents**.

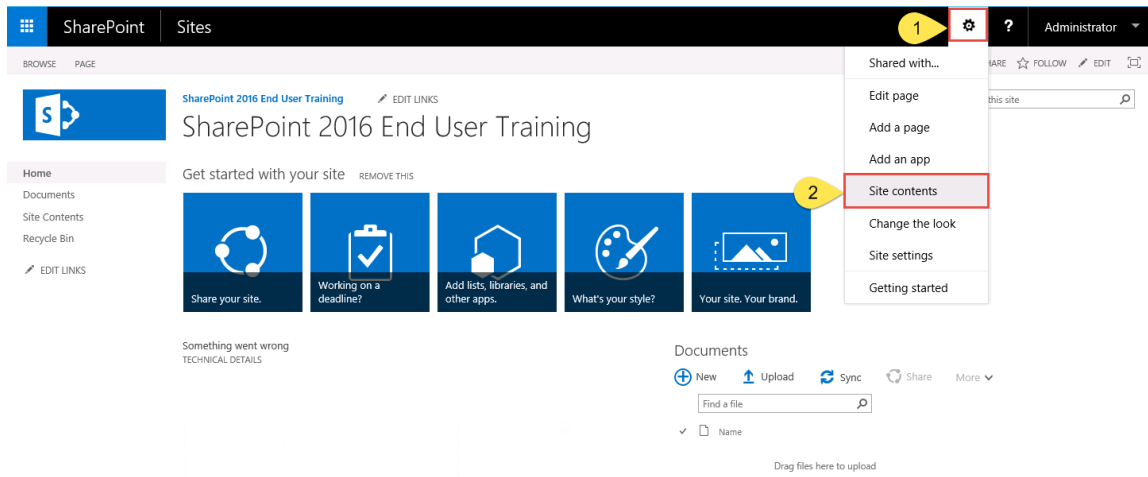


Figure 2.26.1: SharePoint 2016 Site

c) Click **Project Documents** library which you have created in the section 2.1.

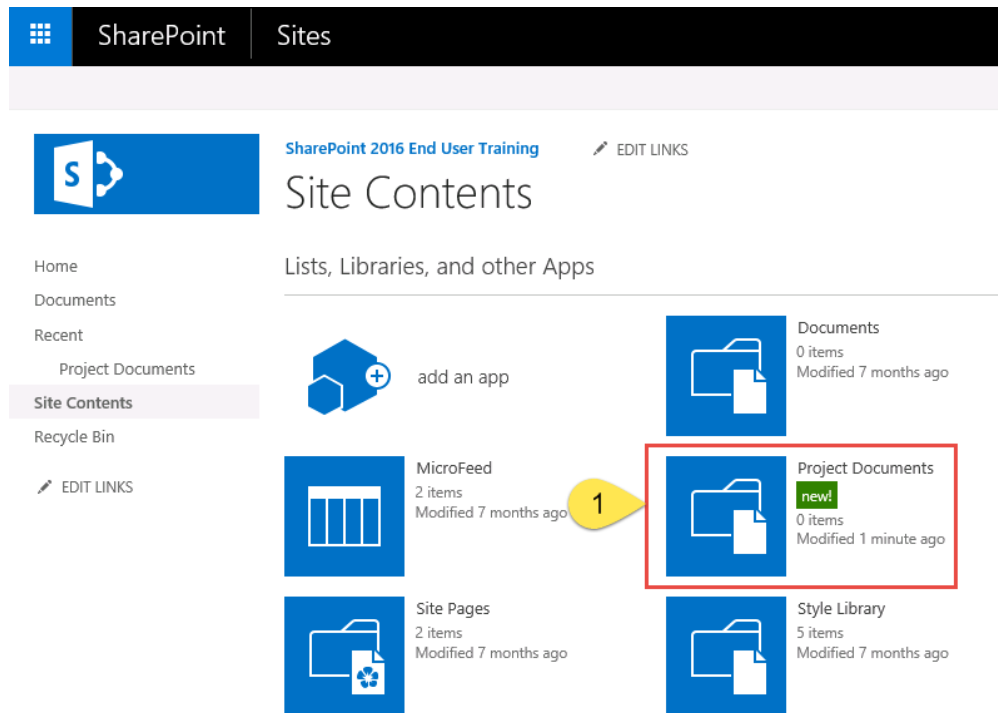


Figure 2.26.2: Site Contents Page

d) In the ribbon interface, click **Library** tab and then click **Library Settings**.

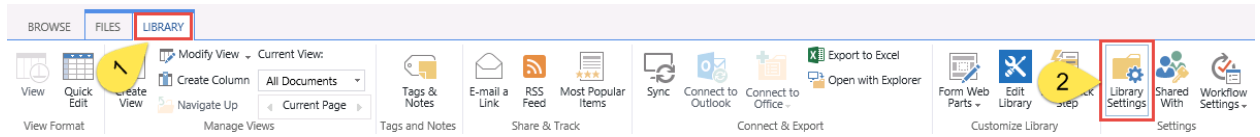


Figure 2.26.3: Library Settings

- e) In the **Settings** page, click **Delete this document library** under **Permissions and Management** section.

Project Documents ▸ Settings

List Information

Name: Project Documents
Web Address: http://c7395723754/Project Documents/Forms/Demo View.aspx
Description:

General Settings

- ▣ [List name, description and navigation](#)
- ▣ [Versioning settings](#)
- ▣ [Advanced settings](#)
- ▣ [Validation settings](#)
- ▣ [Column default value settings](#)
- ▣ [Audience targeting settings](#)
- ▣ [Rating settings](#)
- ▣ [Form settings](#)

Permissions and Management

- ▣ [Delete this document library](#)
- ▣ [Save document library as template](#)
- ▣ [Permissions for this document library](#)
- ▣ [Manage files which have no checked in version](#)
- ▣ [Workflow Settings](#)
- ▣ [Generate file plan report](#)
- ▣ [Enterprise Metadata and Keywords Settings](#)
- ▣ [Information management policy settings](#)

Figure 2.26.4: Library Settings Page

- f) A message will pop up, click **Ok**.

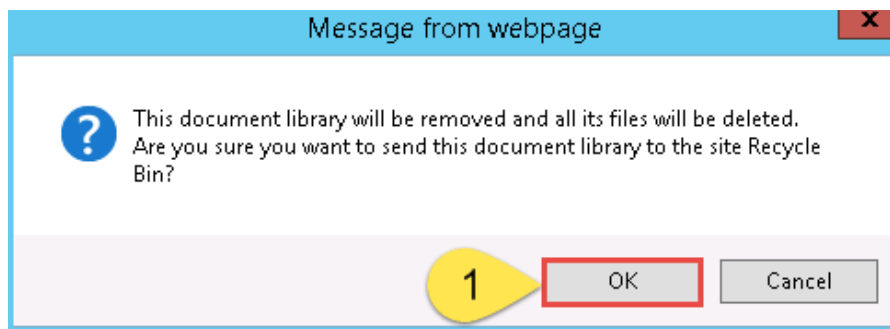


Figure 2.26.5: A Pop-up message

Result

You have successfully deleted the document. Thus, in this section, you saw how to delete the document library as template in SharePoint 2016.

Summary

In this end-user training manual, you saw all the basic operations that can be performed in document library.