MESSAGE @PS

Working with **Document Libraries**

www.messageops.com

Create a Document Library

- From your SharePoint site, select Site Actions -> New 1. **Document Library**
- 2. In the next window, specify the name of the library, if you wish to add it to the quick launch, as well as the default template for the library.

*There are some limitations based on your browser when working with libraries.

Fully supported browsers	Limited browsers
Internet Explorer 9 (32-Bit)	Internet Explorer 9 (64-Bit)
Internet Explorer 8 (32-Bit)	Internet Explorer 8 (64-Bit)
Internet Explorer 7 (32-Bit)	Internet Explorer 7 (64-Bit)
	Mozilla Firefox 3.6 and
	later

Deleting a Library

- Navigate to library you wish to delete. 1.
- 2. From here, go to Library -> Library Settings



On the new screen that comes up, under 3. Permissions and Management, you will see "Delete this document library"

Uploading a Document

- Navigate to desired document library. 1.
- 2. Select Documents -> Upload Document
- 3. Browse for and select desired document



Uploading Multiple Documents

- 1. Navigate to desired document library.
- 2. Select Documents -> Upload Multiple Documents
- 3. Browse for and select desired documents. You can also drag files directly to be uploaded.

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Delete this document library

version

Settings

Workflow Settings

Generate file plan report

Permissions for this document library Manage files which have no checked in

Enterprise Metadata and Keywords

Information management policy settings

Checking Out and Checking In Documents

If at any time, many individuals are working on a document simultaneously, managing the most current updates and content can become quite confusing. By checking out documents, you are able to ensure that the document you are working on is not being altered by another team member.

Checking Out Documents

- Navigate to your document library 1.
- 2. Select Document tab from the ribbon, as well as the check box next to the document you wish to edit.
- Click Check Out from the Ribbon. You can now 3. edit the document without other users accessing and making changes to it.

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Checking In Documents

- 1. Open your document library.
- 2. After you have edited your checked out
- document, select the check box next to it. Click Check In -> Ok. 3.

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Adding Metadata Columns

Rather than having to spend time digging and searching for documents, you can create metadata to assist with filtering documents based on the author, due date, and other metadata.

Navigate to your 1.

Metadata

Click Library Tab ->

Library Settings ->

navigation settings

2.

- Title, description and navigation document library. Versioning settings
 - Advanced settings
 - Validation settings

General Settings

- Column default value settings
- Rating settings
- 3. Select the fields to filter by and move from Available to Selected.

Form settings

4. Click Ok and navigate back to your document library. You can now filter these documents based on their metadata properties.

Key Filters Apply	Clear
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