



University Information
Technology Services

Microsoft SharePoint 2016

Document Management

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

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Published by Kennesaw State University - UITS 2017

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University Information Technology Services

Microsoft SharePoint 2016 with Office 365

Document Management

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Introduction

This booklet is the companion document to the SharePoint 2016 with Office 365 workshop. The booklet will show users how to upload, create, and manage documents using document libraries and how to create a document workflow.

Learning Objectives

After completing the instructions in this booklet, you will be able to:

- Upload and open documents
- Create Documents from the Document library
- Check in and check out documents
- Create and manage document versioning
- Creating, modifying, and sorting document views

Overview of Document Management

Microsoft SharePoint's document libraries provide a platform for sharing documents. The use of a central storage area makes document collaboration and compliance with audit requirements easier.

The Document Library Window

The image below shows the a document library window. Documents that have been uploaded into SharePoint, or created in the library, are collected in document libraries and listed in the window.

The Quick Launch panel at the left of the window lists all list and library content along with links to display and manage other apps in the window. *Documents* is the default document library that comes with SharePoint 2016 with Office 365. Users with rights to do so can create other document libraries.

Each document library list contains information about the document, which is organized into site columns. The site column headings can be used to sort and filter the documents listed.

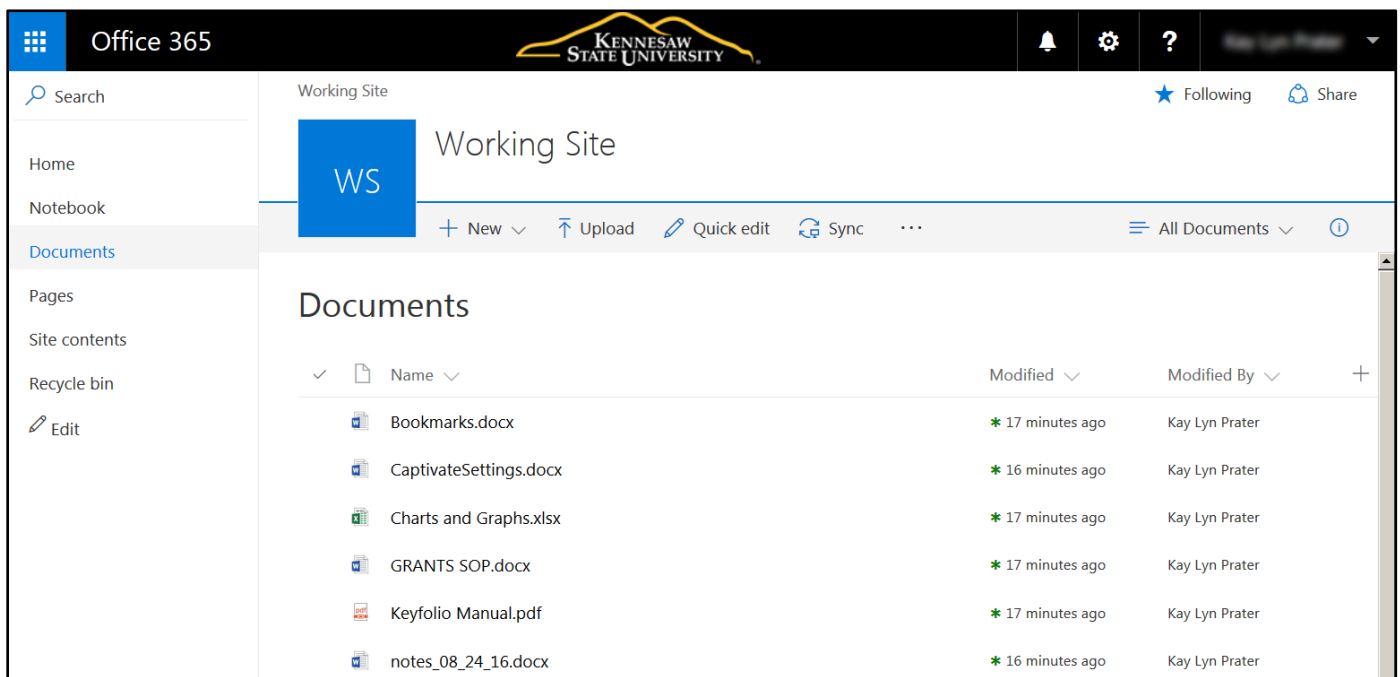


Figure 1 - Document Center

Uploading Documents to a SharePoint Document Library

The easiest way to upload files is to simply drag the file into your document library file list. The file will automatically be uploaded to your library. To upload using the drop and drag method, follow the steps below:

1. In the *Quick Launch* panel, click the **Document library** where you want the document to be stored (See Figure 2).
2. Click the **file(s)** you want to upload (See Figure 2).
3. Drag to any location on the library page (See Figure 2).

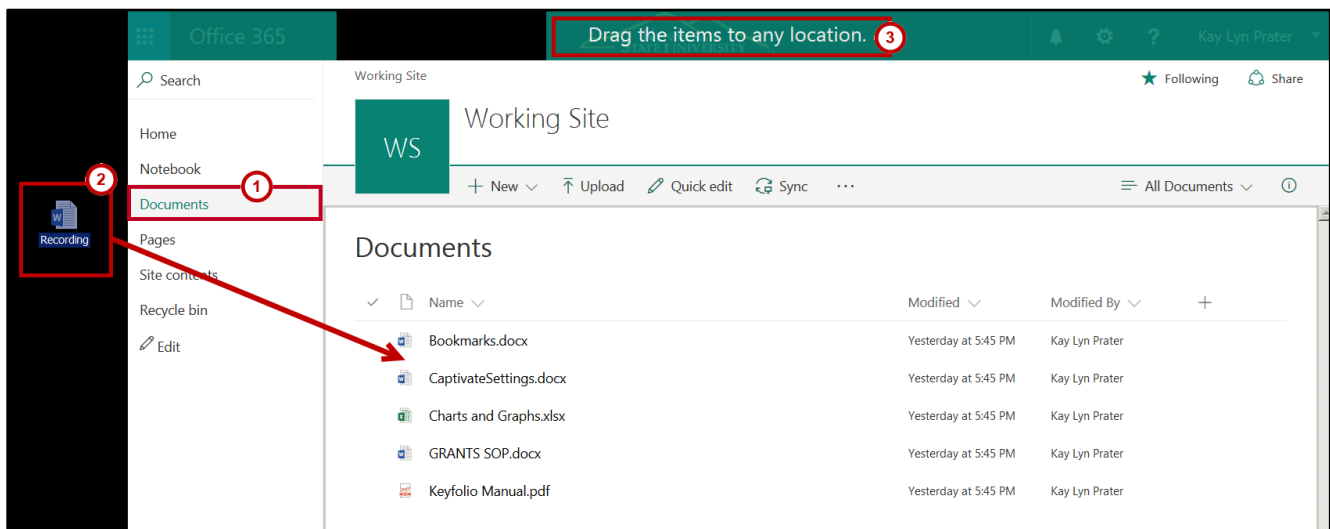


Figure 2 - Click and Drag

4. The file is now uploaded to the document library.

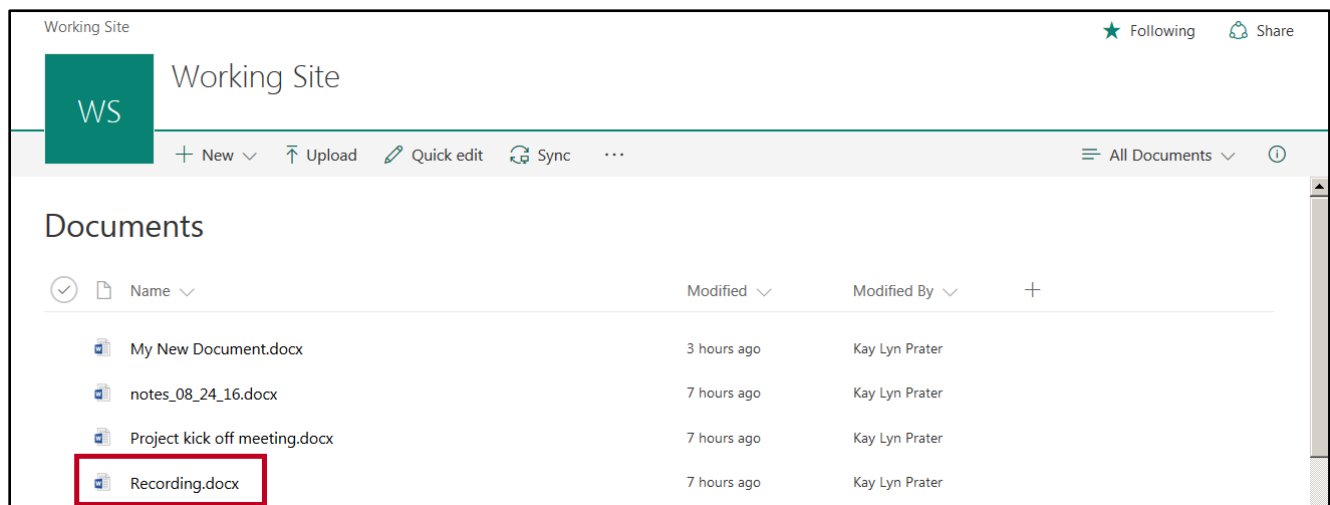


Figure 3 - Document Uploaded

You can also upload files and/or folders by following the steps below:

1. In the *Quick Launch* panel, click the **Document Library** where you want your document stored (See Figure 4).
2. Click **Upload** (See Figure 4).

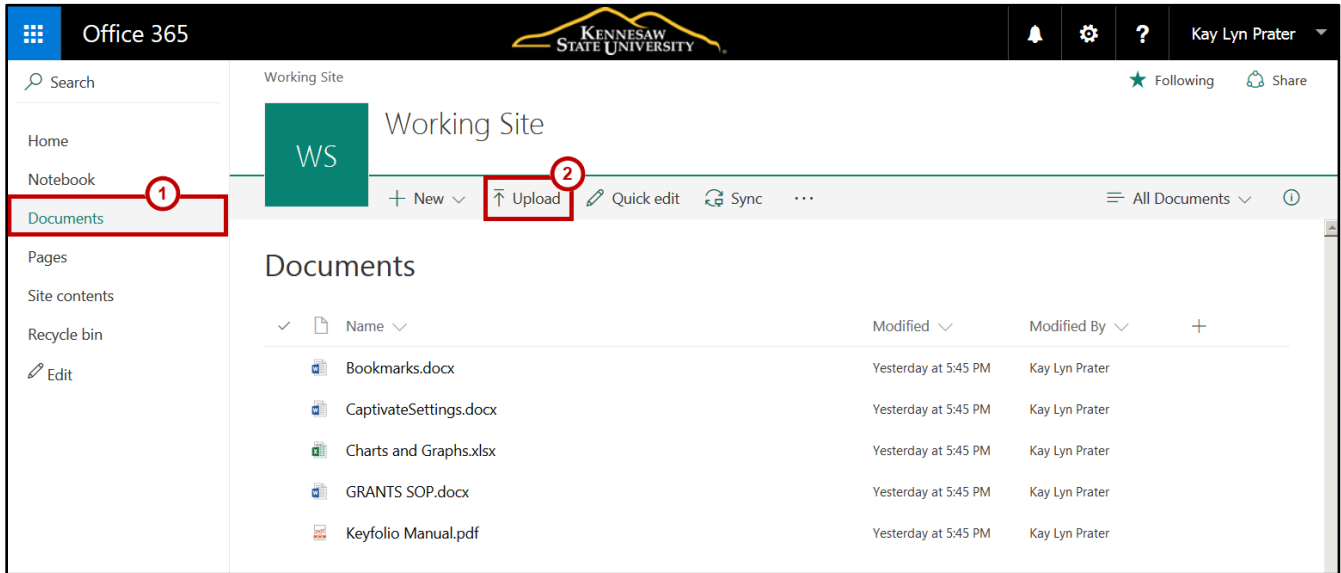


Figure 4 - Click Upload

3. The *File Explorer* will appear.
4. Select your file(s) from your computer, and click **Open**.

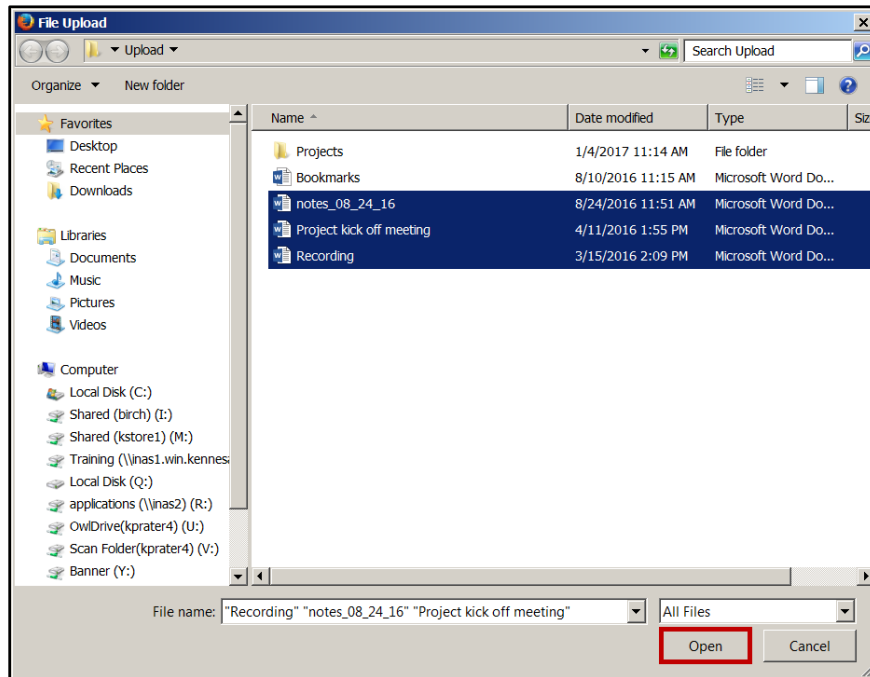


Figure 5 - File Upload

Note: Hold **CTRL** as you click to select multiple files to upload.

5. The toolbar will display the number of files being uploaded to the document library.

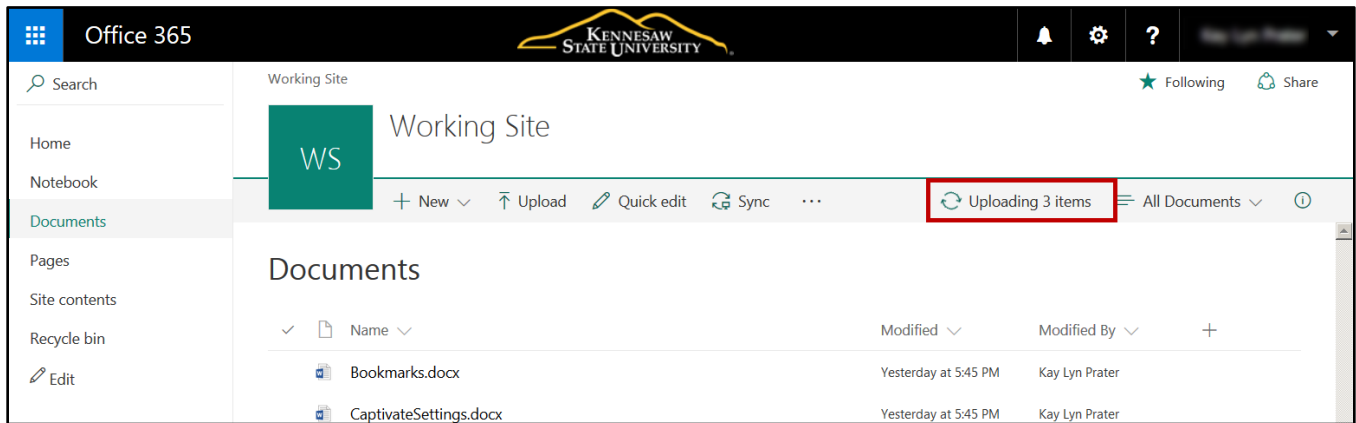


Figure 6 - Uploading Files

6. The file(s) is uploaded to the document library.

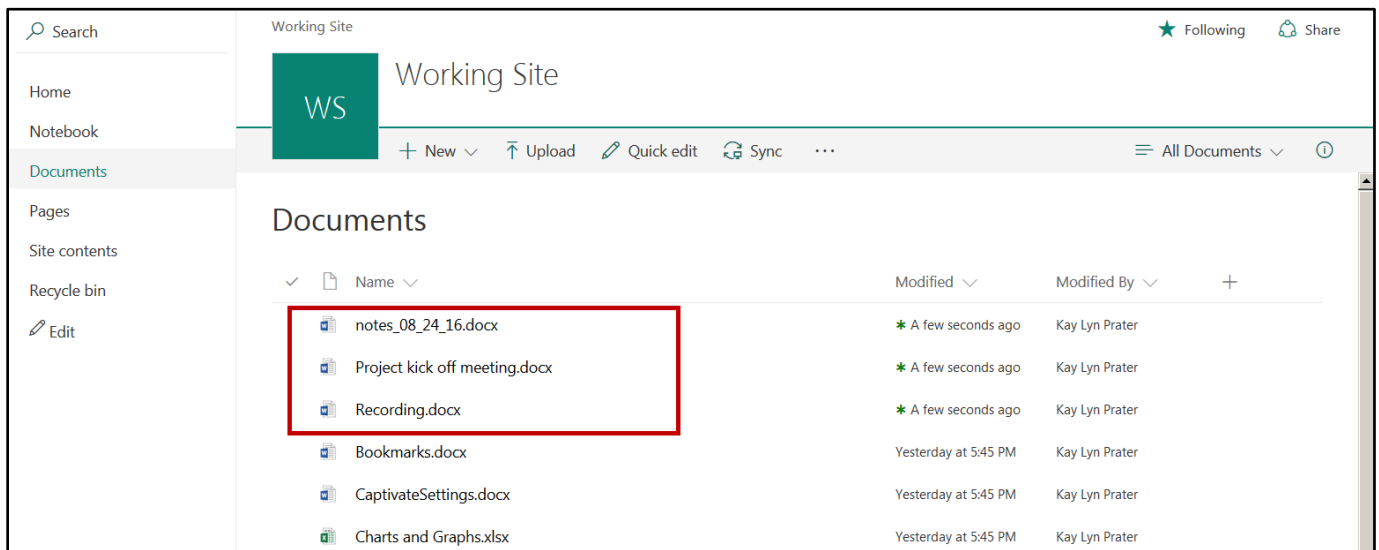


Figure 7 - File Uploaded Successfully

Creating a New Document in a SharePoint Document Library

SharePoint is integrated with Microsoft Word, Excel, PowerPoint, and OneNote. As such, SharePoint uses these online apps to create new documents. The document will open in the version of *Office Online* that is suitable to the file (e.g. Word documents will open in *Word Online*, etc). Once created in the online app, if you have Microsoft Office installed on your computer, then you may open with the corresponding Office program.

To create a new document:

1. In the *Quick Launch* panel, select the name of the **Document Library** in which you want to store the new document (See Figure 8).
2. Click **New** (See Figure 8).
3. A list will appear displaying options to create a new folder, web link, or various types of Office documents. For example, click **Word document**. (See Figure 8).

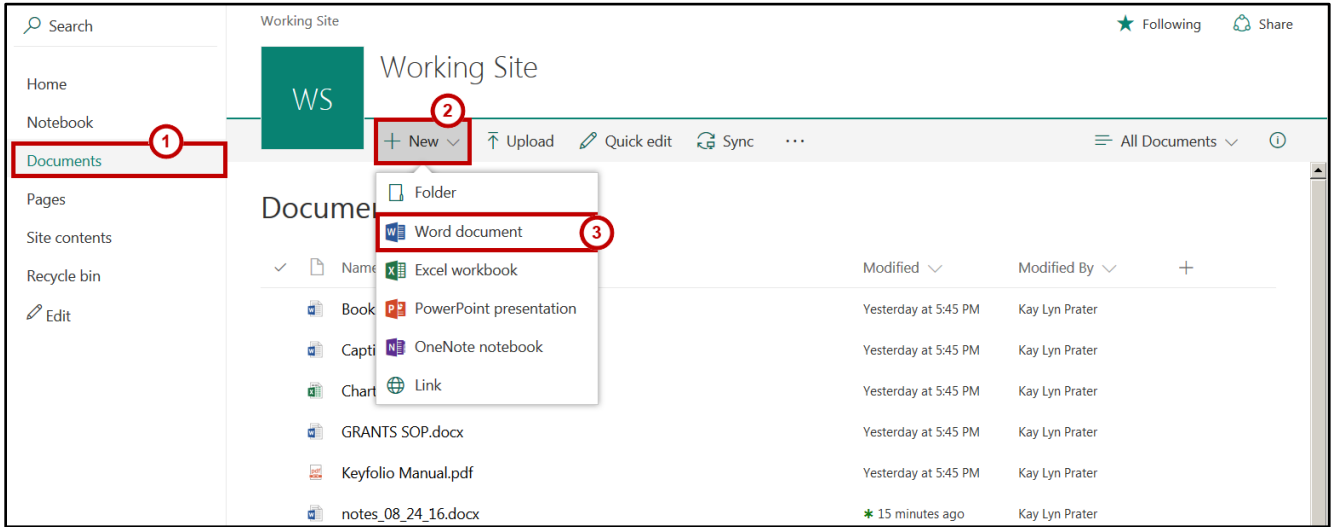


Figure 8 - Create New Document

4. *Word Online* will open with a blank document ready for you to edit.

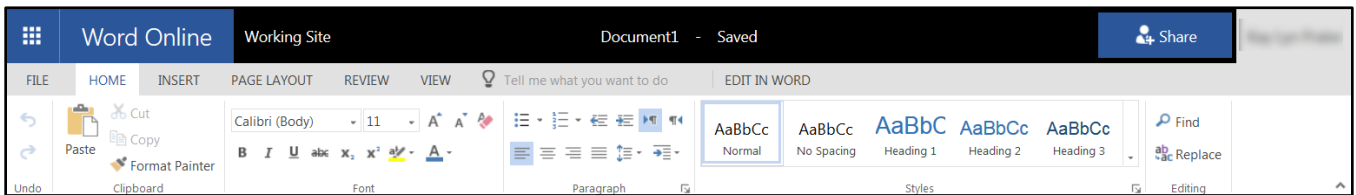


Figure 9 - New Document Created in Word Online

5. To change the document name from within *Word Online*, simply click the **document name**.

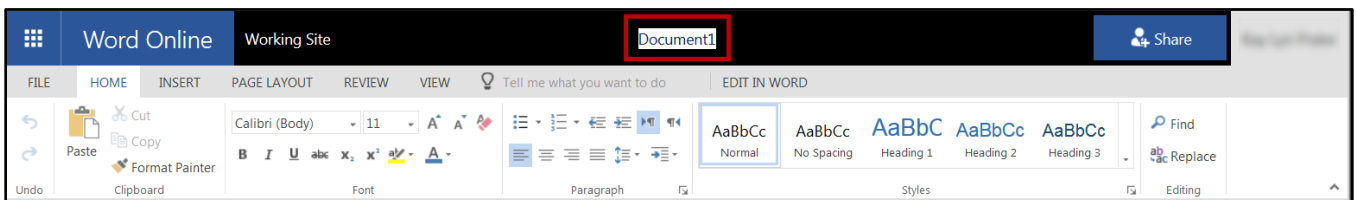


Figure 10- Click the Document Name

6. Enter the **new document name** (See Figure 11).
7. When you have completed your edits and want to return to the document library, click the **site name** next to *Word Online* (See Figure 11).

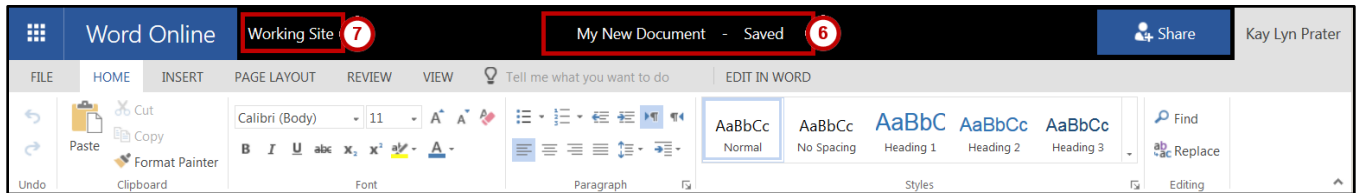


Figure 11 - Change the Document Name and Return to the Document Library

8. Your new document now appears in the selected SharePoint document library.

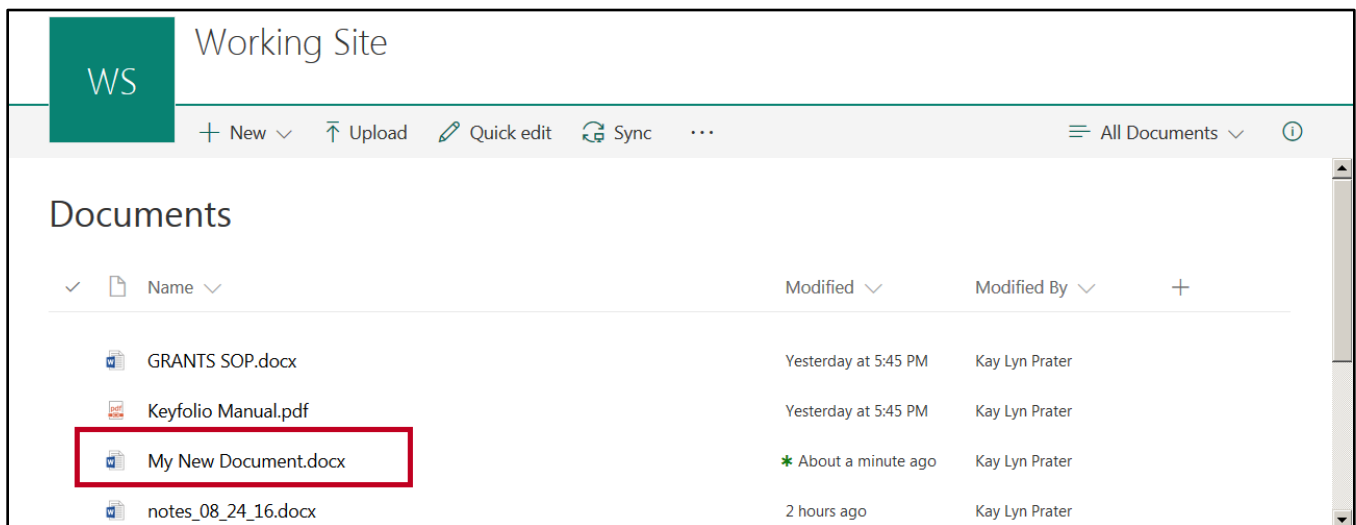


Figure 12 - Your New Document

Opening Documents in a SharePoint Document Library

SharePoint Document Libraries allow you to access your *Microsoft Office* files and edit them online with the *Microsoft Office Online* set of tools, or open the file in the desktop version of Microsoft Office.

The following example will demonstrate how to open a Word document in Word Online, then continue editing the document in the desktop version of Word:

1. Click the **document name** in the Document Library list.

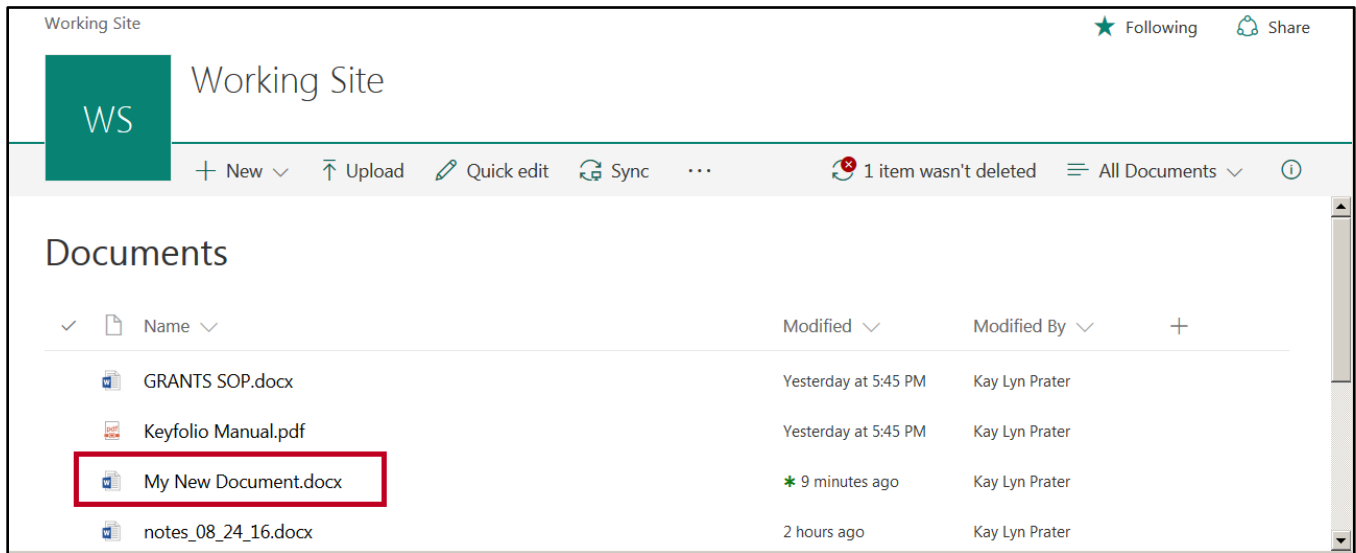


Figure 13 - Click the Document Name

2. The document will open in the version of *Office Online* that is suitable to the file (e.g. Word documents will open in *Word Online*, etc). You can preview the document, or choose to edit the document within your browser. Click **Edit Document**.

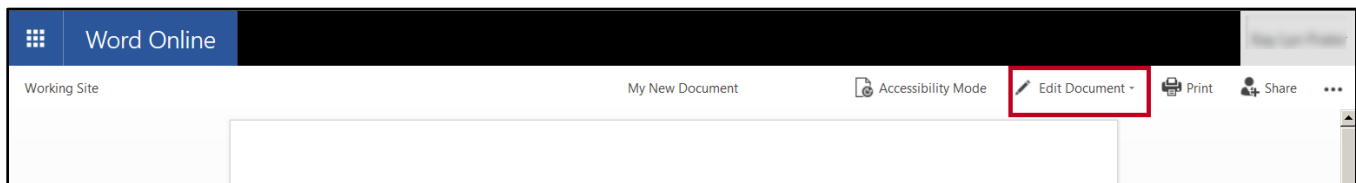


Figure 14 - Edit Document

3. A drop down menu will appear with the following:
 - a. **Edit in Word:** If you have Microsoft Office installed on your computer, then the file will open with the corresponding Office program (See Figure 15).
 - b. **Edit in Browser:** You can select to edit the document in *Word Online*, or open the document in your desktop version of *Microsoft Word* (See Figure 15).

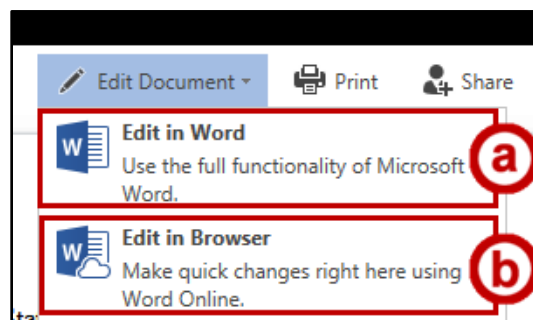


Figure 15 - Edit in Word or in Browser

- When you have completed your edits and want to return to your document library, click the **SharePoint site name** next to *Word Online*.

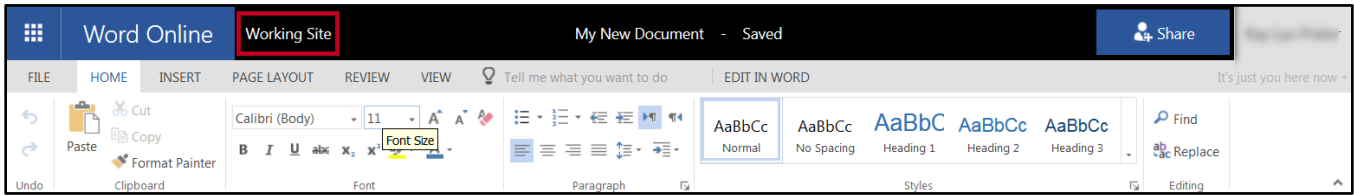


Figure 16 - Click the Site Name

- You will be returned to your document library.
- You can also open a document in the library by:
 - Clicking the space to the **left** of the document to select it (See Figure 17).
 - Clicking **Open** to reveal a drop-down with more options (See Figure 17).

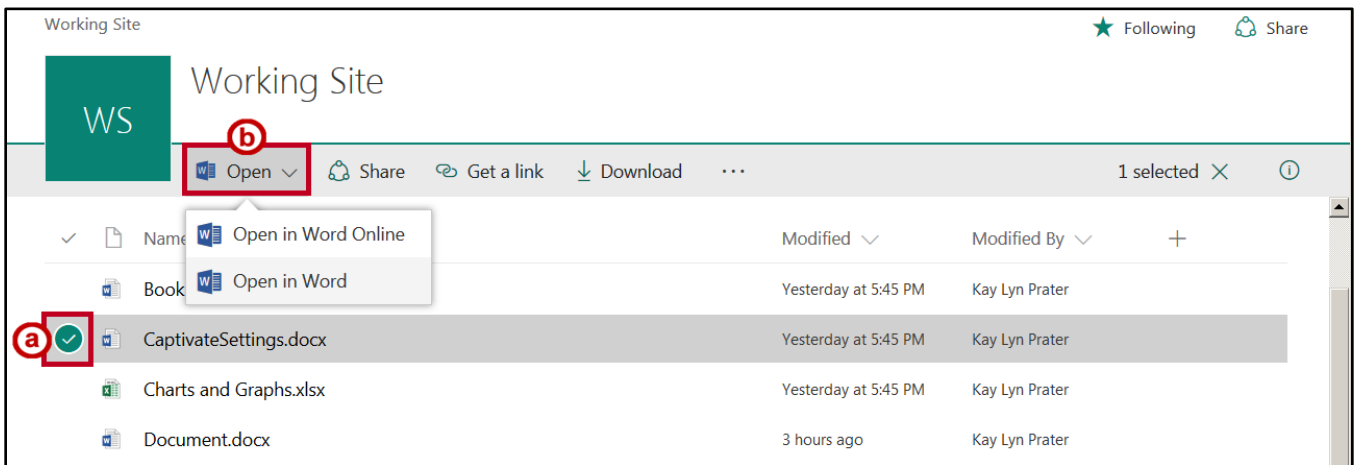


Figure 17 - Open a Document

- When selecting *Open in Word* as in this example, a window will appear asking if you want to open the file. Click **Yes**.

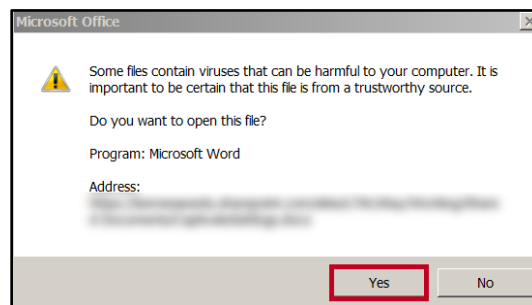


Figure 18 - Open File

- The document will open in your desktop version of *Microsoft Office*.

Document Check Out

If the document library has been configured to require document *check in* and *check out*, before you can edit a *SharePoint* document, you must first *check out* that document. *Checking out* a document prevents anyone else from editing the document until you check the document back in. Once the document is *checked in*, the document becomes available again to be checked-out by someone else. In addition, all changes made by the person who *checked in* the document are now visible to others.

To check out a document:

1. Place a **check mark** in front of the document you want to check out (See Figure 19).
2. On the *Toolbar*, click the **ellipses** for to reveal options (See Figure 19).
3. In the resulting drop-down menu, click **Check out** (See Figure 19).

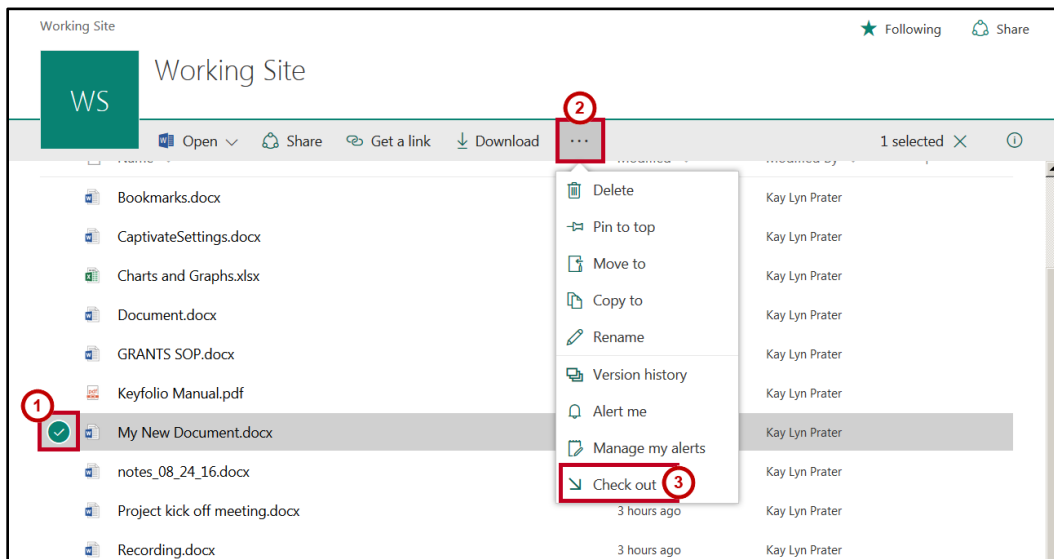


Figure 19 - Check Out Document

4. Next to the document selected, now appears a green and white arrow, indicating that it is *checked out*.

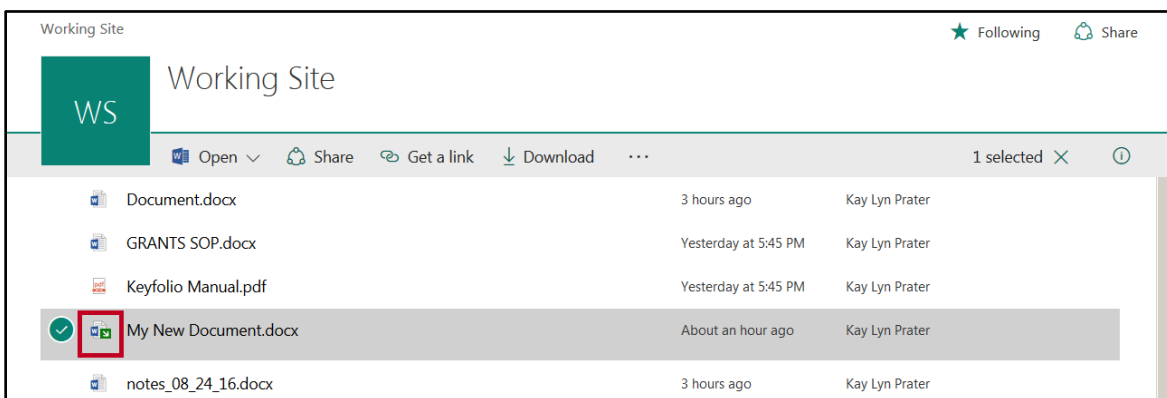


Figure 20 - Checked Out Document Icon

5. Click the **document** to open in the online application.

Document Check In

To check in a document:

1. Place a **check mark** in front of the document you want to *check in* (See Figure 21).
2. On the *Ribbon*, click the **ellipses** (See Figure 21).
3. In the drop-down menu, click **Check in** (See Figure 21).

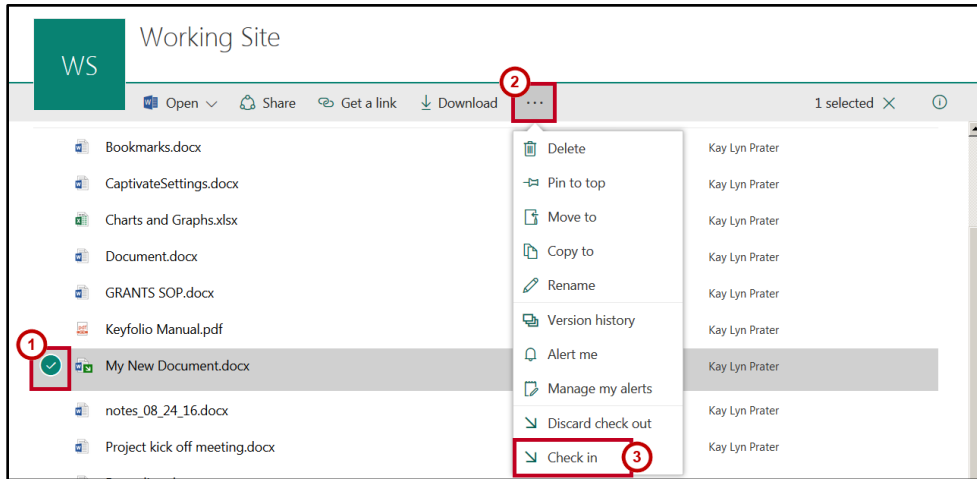


Figure 21 - Document Check In

4. If the document library has been configured to save major and minor revisions, the *Check in* window opens providing options for checking-in the document version.
 - a. The *Version* type defaults to a draft or minor revision. To change to a major revision, click the **radio button** to the left of *Major version* (See Figure 22).
 - b. If you want others to be able to view your most recent changes, but you want to continue editing, click **Yes** to retain your check out. Otherwise leave the default setting of **No** selected (See Figure 22).
 - c. Type comments describing what has been changed in the current revision (See Figure 22).
 - d. Click **OK** to continue (See Figure 22).

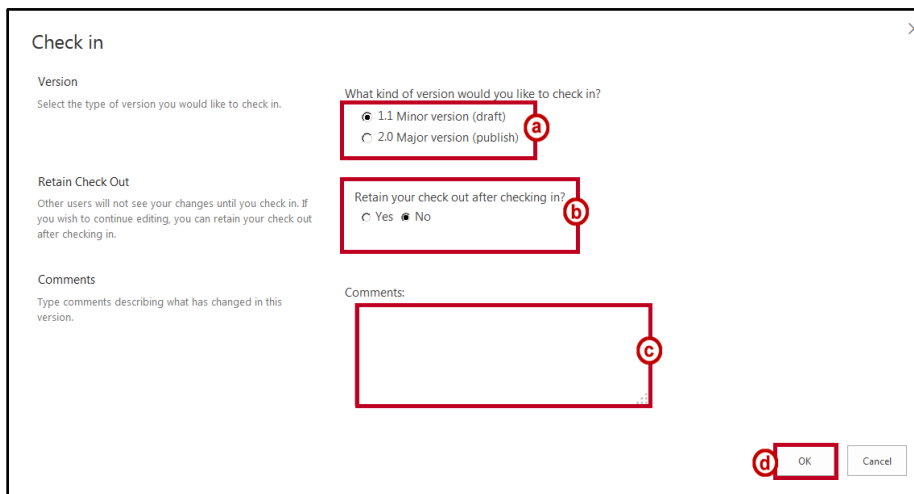


Figure 22 - Check in Window

5. The document is now *checked in* and the icon is removed from the document.

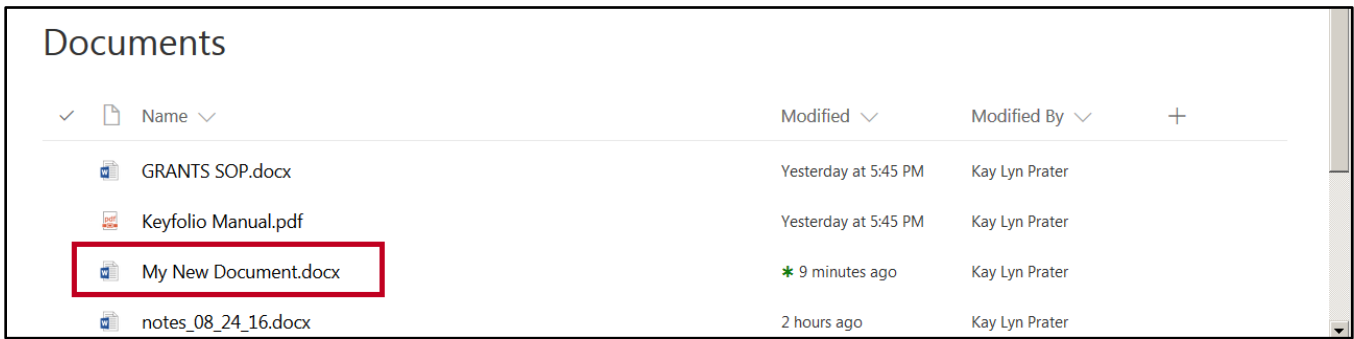


Figure 23 - Document Checked In

6. If you do not want to save a version of the document, you can select **Discard Check Out** from the drop-down menu.

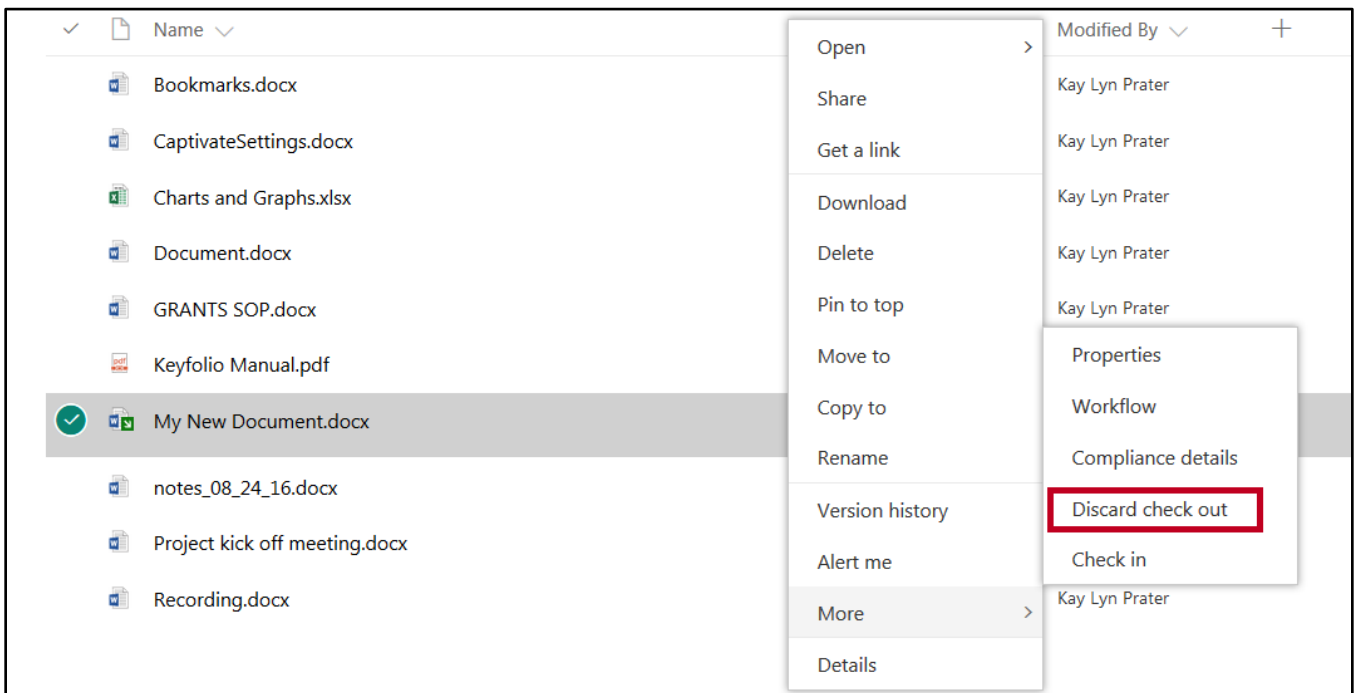


Figure 24 - Discard Check Out

If the document library is configured to save only major revisions of the document, the *Check in* box opens only with a *Comments* section.

1. Enter a **comment** to describe what has changed in the current version being saved (See Figure 25).
2. Click **Check in** (See Figure 25).

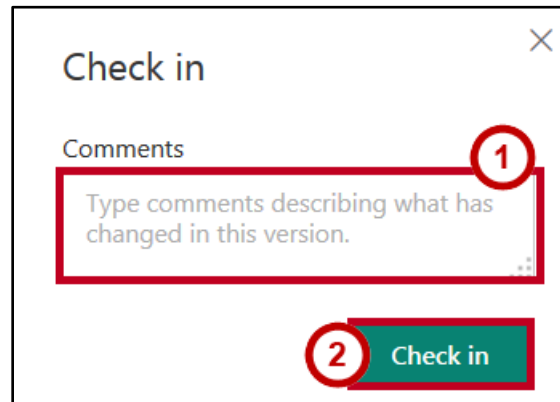


Figure 25- Check In

Maintaining Document Versions

When versioning is enabled for libraries and lists, you may track and manage items as things evolve in the library or list. You may view earlier versions of items and revert back to a prior version if needed. When versioning is configured for a document library, documents stored in that library are assigned versions when they are checked-in. Versioning can be set to create either just major, or, major and minor versions. A major version is usually one that is ready for a larger group to see and review, whereas a minor version is a draft that someone is still working on.

A document can be edited only by those who have permissions to do so. If versioning has been applied to the document, a user who has editing permissions will, by default, see the most recent minor version of the document; a user who has only *read* permissions will see the most recent major version.

To open a specific version of a document:

1. Place a **Check mark** in front of the document for which you want view version history (See Figure 26).
2. On the *Toolbar*, click the **Ellipses** (See Figure 26).
3. In the resulting drop-down menu, click **Version History** (See Figure 26).

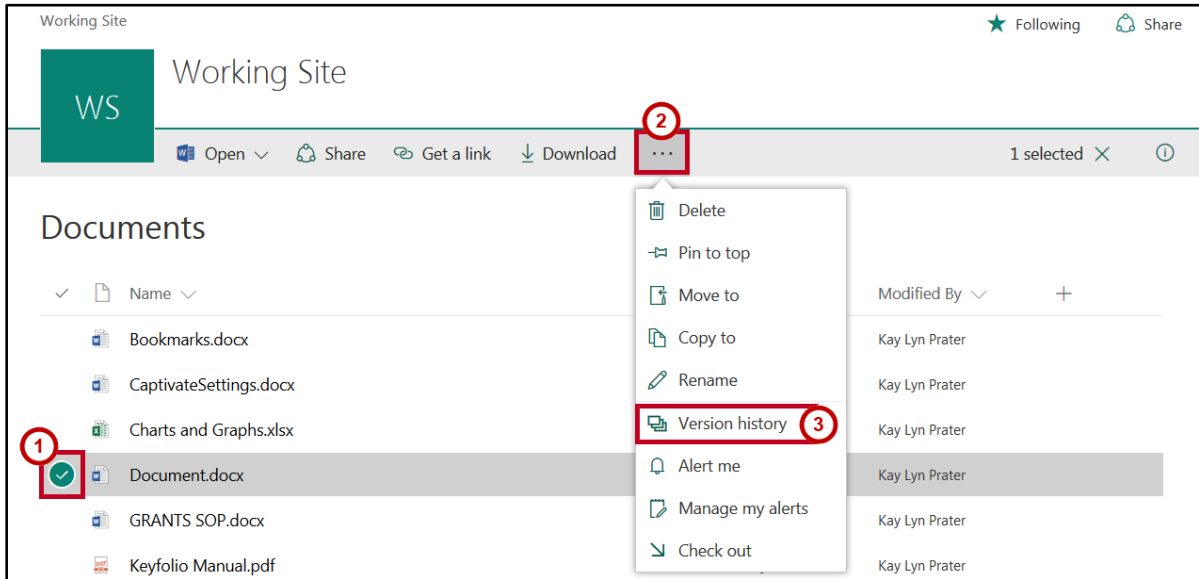


Figure 26 - Version History

4. The *Version History* window displays each version of the document, including date modified, modified by information, and any comments entered for the revision.
5. Click the version **date** you want to open.

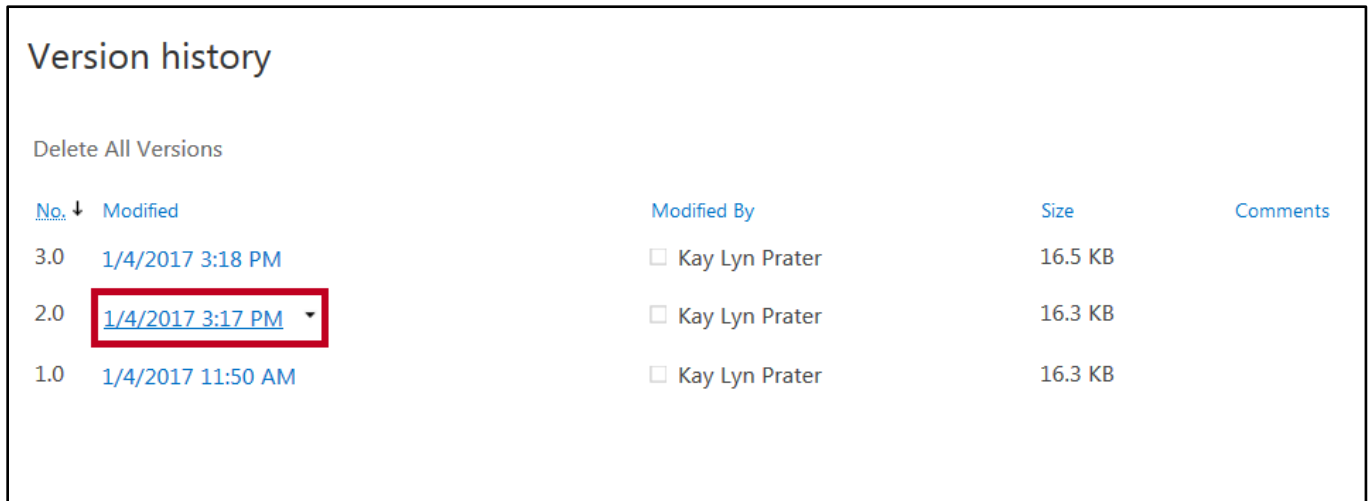


Figure 27 - Version History Information

Note: You should only modify the latest version of the document.

6. The document will open in the corresponding application installed on your computer (versioning is not available in the online applications) . The following options will be displayed:
 - a. Click **Compare** to review a comparison of the document revisions (See Figure 28).
 - b. Click **Restore** to make the previous version the latest revision (See Figure 28).

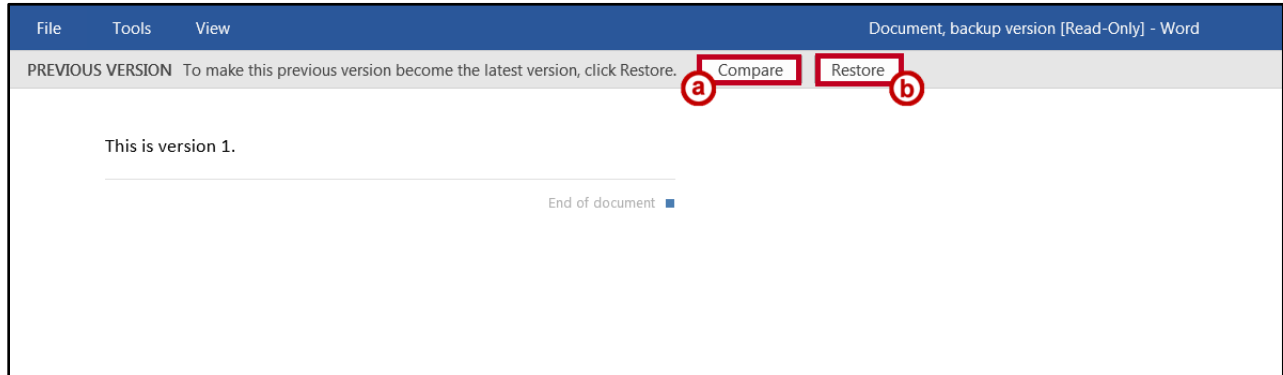


Figure 28 - Version Options

7. When selecting *Compare*, all versions of the document are displayed in the application.

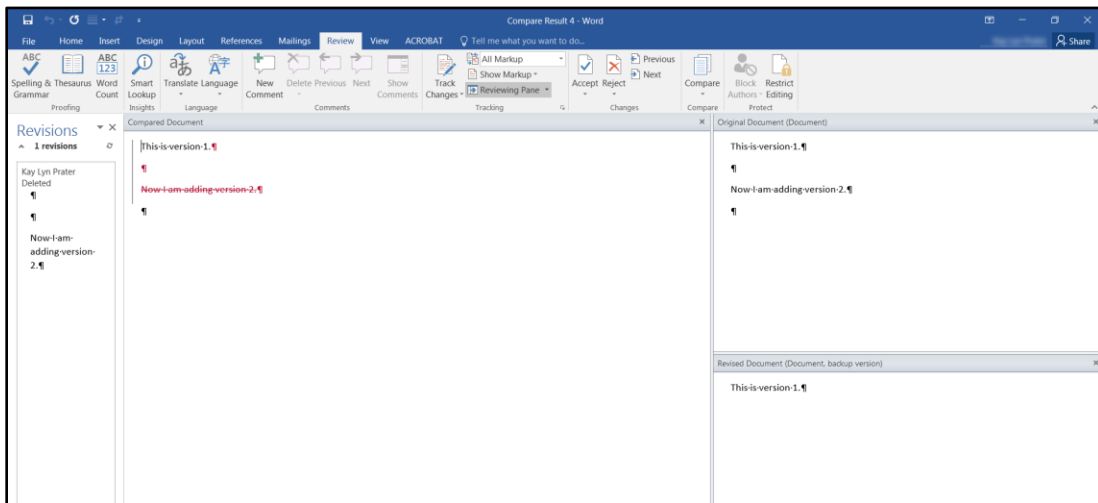


Figure 29 - Document Version Display

Note: If document check in and check out is configured as required, you must check out the document before making any modifications to the versioning.

Moving and Copying Documents

Moving Files into Folders

1. To create the new folder:
 - a. Click **New** in the toolbar (See Figure 30).
 - b. In the resulting drop-down, click **Folder** (See Figure 30).

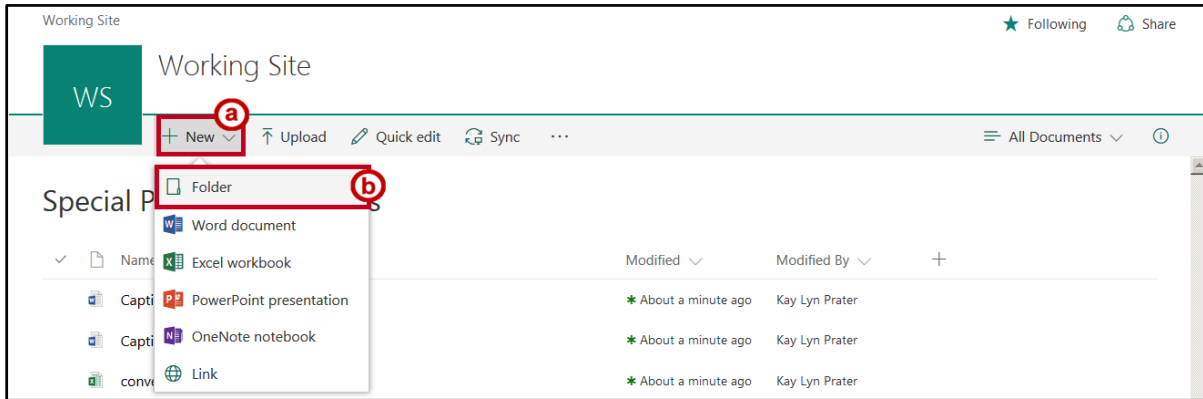


Figure 30 - Create Folder

- c. Enter a **name** for the folder (See Figure 31).
- d. Click **Create** (See Figure 31)..



Figure 31 - Enter Folder Name

- e. The folder is displayed in the document library.
2. To move a file into a folder, simply drag it on top of the desired **folder**, then release. The file will be moved into the folder.

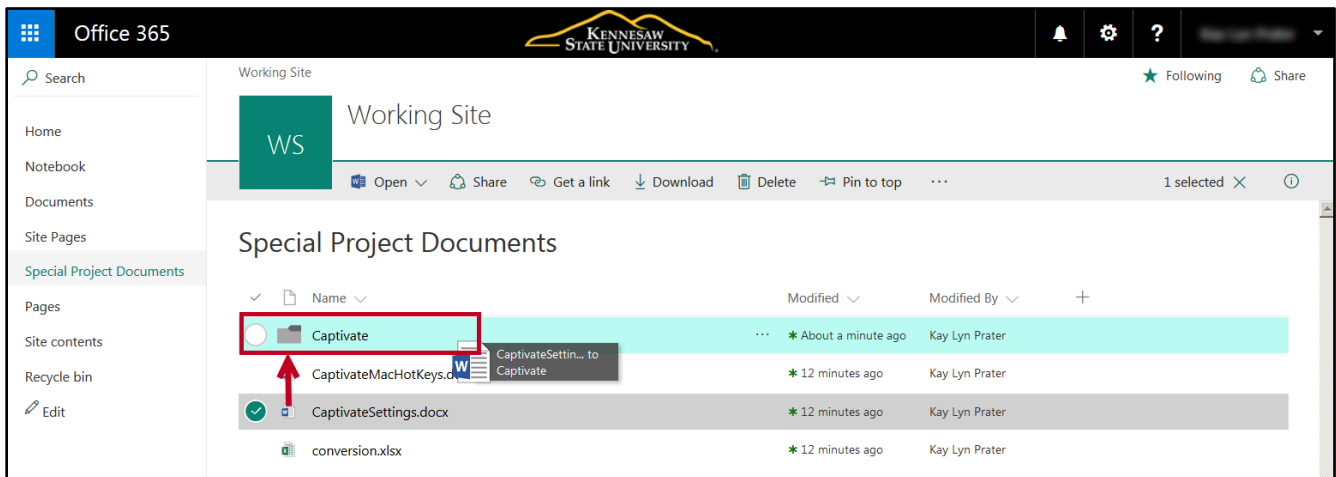


Figure 32 - Left-Click and Drag Files on to Folders

3. You can also select multiple files by clicking the **space to the left of the file**, then dragging the group to the folder.

Moving Files from One Folder to Another

1. Select the **files** to move (See Figure 33).
2. Click **Move to** in the toolbar (See Figure 33).

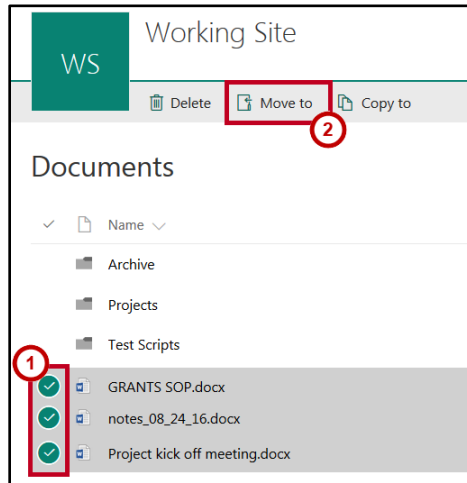


Figure 33 - Move To

3. File location options will appear to the right. Click a **folder** destination (See Figure 34).
4. Click **Move here** (See Figure 34).

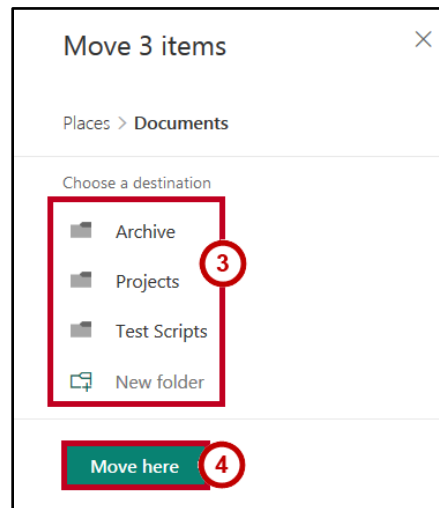


Figure 34 - Move Files to Destination

Copy Files from One Folder to Another

1. Select the **files** to move (See Figure 35).
2. Click **Copy to** in the toolbar (See Figure 35).

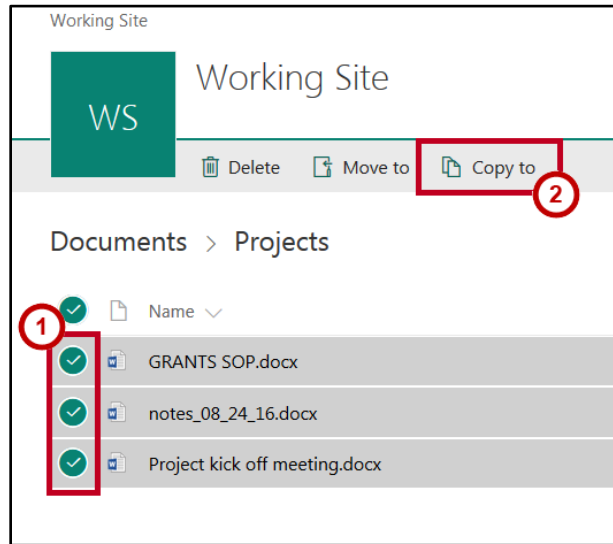


Figure 35 - Copy To

3. File location options will appear to the right. Click a **folder** destination (See Figure 36).
4. Click **Copy here** (See Figure 36)

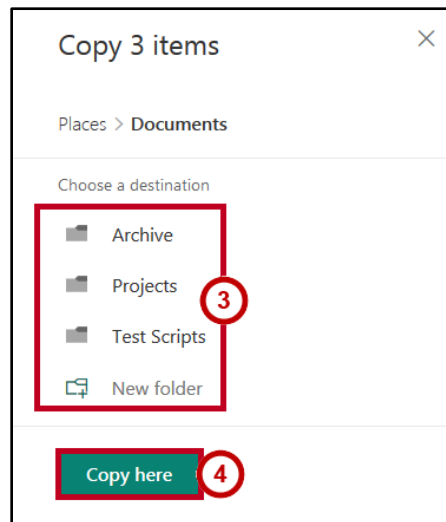


Figure 36 - Copy Files to Destination

Using File Explorer to Move or Copy Between Libraries

The File Explorer view allows you to drag and drop files into your library, create folders, move and copy files, and delete files in your library. It is only available using Internet Explorer. The following explains how to use *View in File Explorer*:

1. Navigate to the **document library** containing the files you want to copy or move (See Figure 37).
2. Click the **All Documents** drop-down (See Figure 37).
3. Click the **View in File Explorer** (See Figure 37).

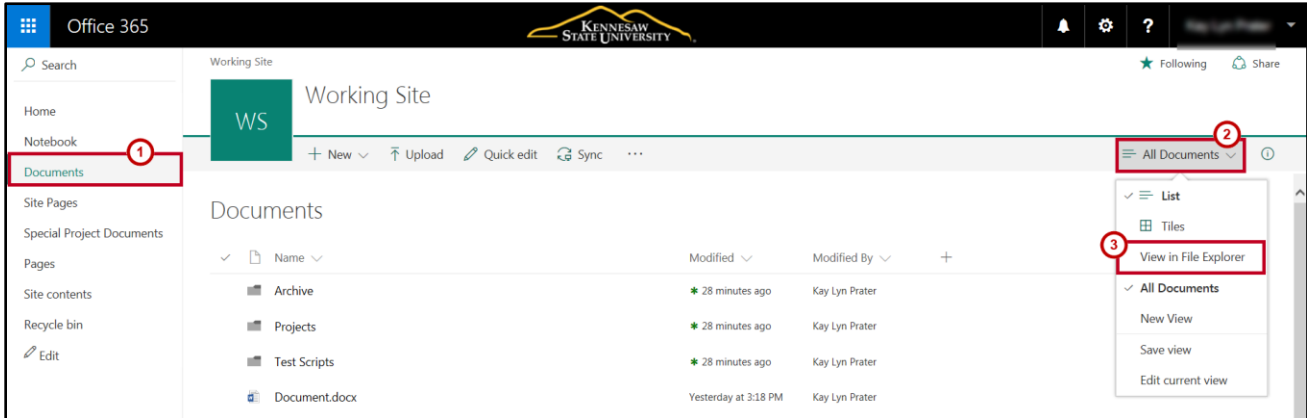


Figure 37 - View in File Explorer

4. A Microsoft *File Explorer* window opens for the original library.
5. Navigate to the **document library** to which you want to copy or move the folders and/or files.
4. Follow steps 2 and 3 above (See Figure 37).
6. Now you have two *Explorer* windows open—one for the origin library (See Figure 38) and one for the destination library (See Figure 39). Highlight the **Files** and **Folders** you want copy or move.

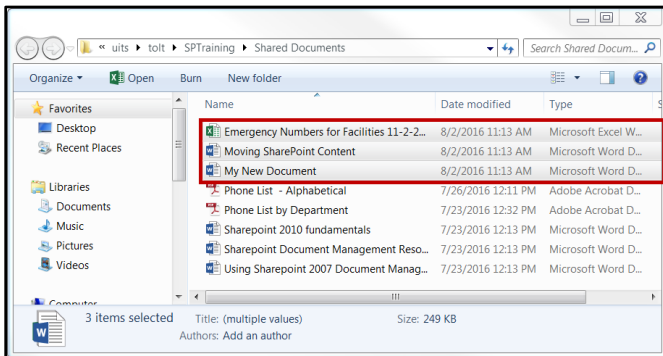


Figure 38 - Origin Library

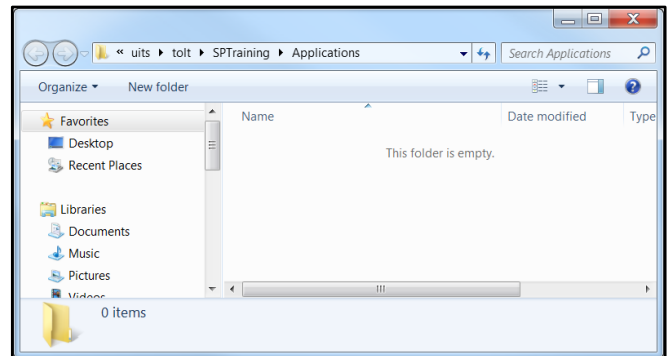


Figure 39 - Desination Library

7. To **move** files:

- a. Drag the highlighted files to the **destination library** location and drop in the open *Explorer* window.

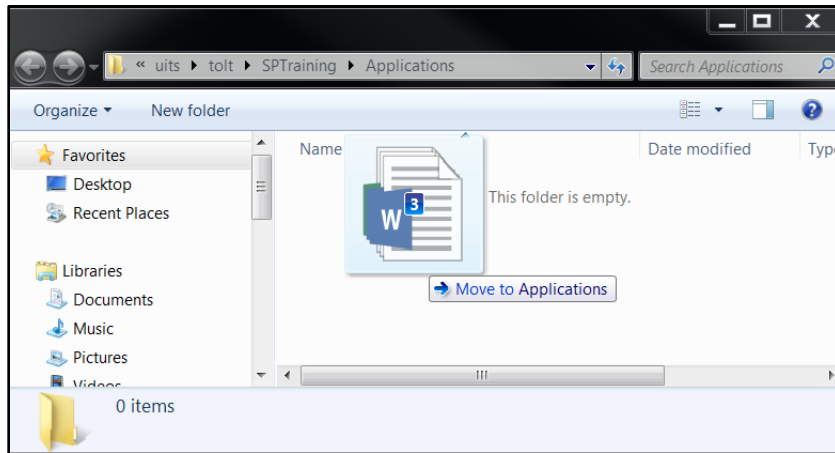


Figure 40 - Drag and Drop Files to Destination Library

- b. The files are moved from the origin library to the destination library.

8. To **copy** files:

- c. Right-click the **highlighted files** in the origin library and select **Copy** in the drop-down list.

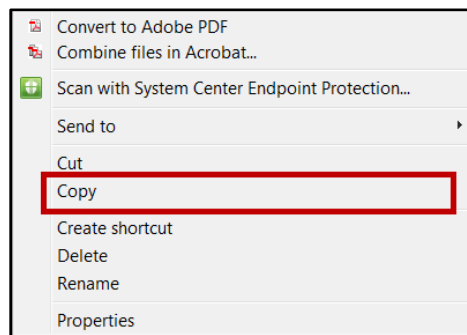


Figure 41 - Click Copy

- d. Right-click inside the **destination library** window and select **Paste**.

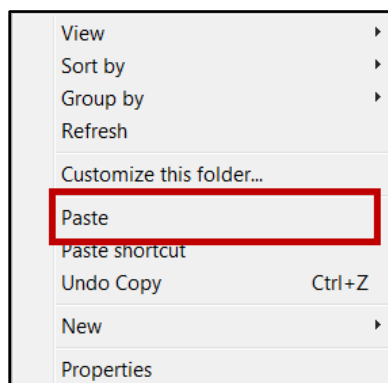


Figure 42 - Select Paste

Assigning a Workflow to a Document

A workflow is the automated movement of a document through a series of actions or tasks. If several people are collaborating on the creation or editing of a document, one of the collaborators can begin a workflow which will route the document to each person in order. When one person checks the document in, it will be forwarded on to the next person.

To start a workflow:

1. Place a **check mark** in front of the document for which you want to start a workflow (See Figure 43).
2. To the right of the document name, click the **ellipses** (See Figure 43).

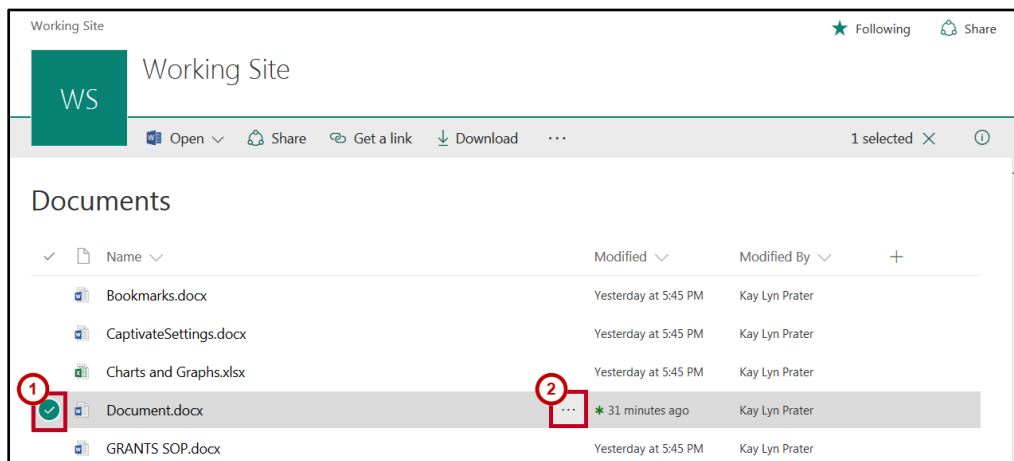


Figure 43 - Select Document

3. In the resulting drop-down menu, click **More** (See Figure 44).
4. Click **Workflow** (See Figure 44).

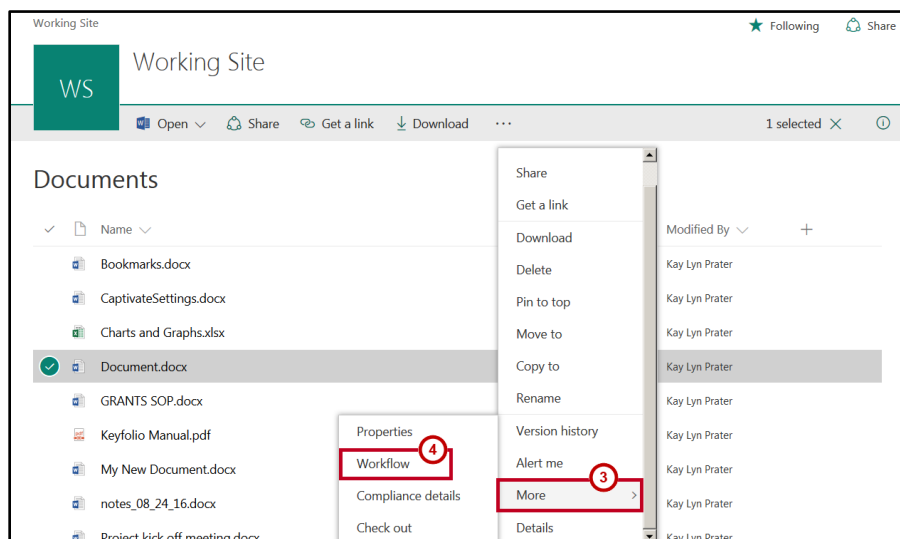


Figure 44 - Selecting a Document Workflow

5. Click the **Workflow name** in the *Workflows* window.

Sorting and Filtering Document Library Lists

Document libraries are created with default view settings, however, there are various methods to customize your view settings. At the right of the toolbar, you can change from list view to tile view or create a custom view to be able to switch back and forth between various views to suit your needs. Simply click **All Documents** to begin customizing your view.

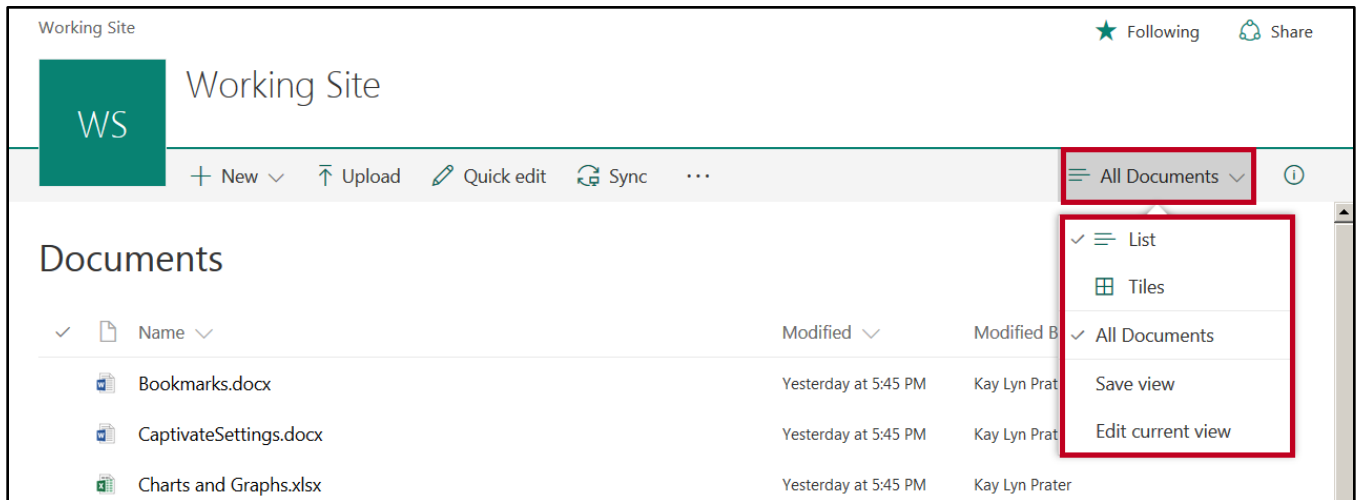


Figure 45 - List Options

Document library lists can also be sorted and filtered using column headings. In the image below, you see the standard site columns *Name*, *Modified*, and *Modified By*. To sort or filter by one of these columns:

1. Click the **drop-down arrow** next to the header by which you want to sort (See Figure 46).
2. Click the **sort order** or **filter criteria** from the drop-down (See Figure 46).

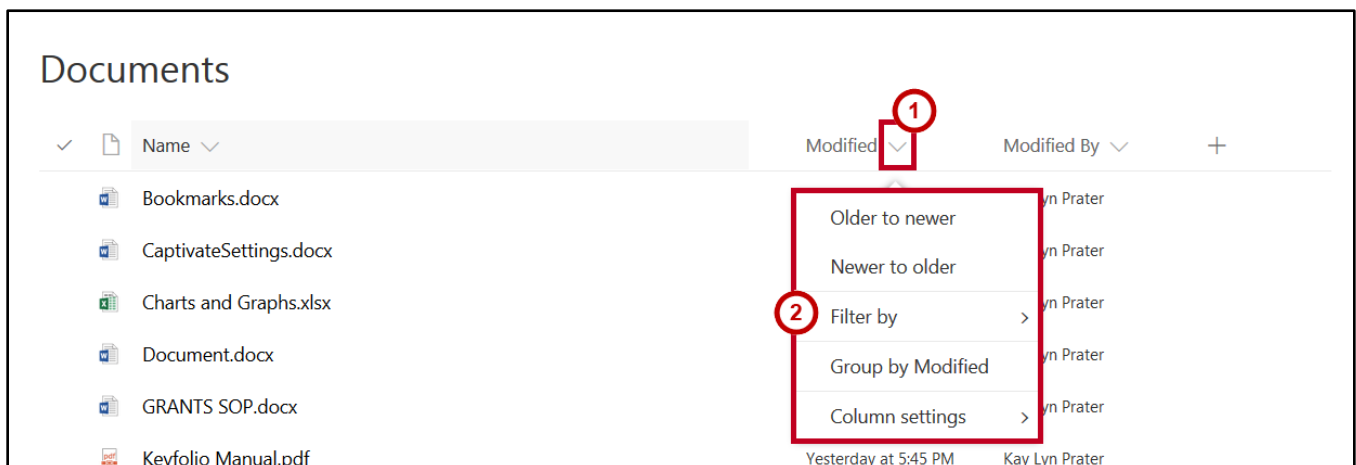


Figure 46 - Sort By Drop-Down Arrow

You may also add columns and customize the default view to the current view. In the *Edit View* screen, you may customize columns being displayed and the specific order, adjust sorting and filtering, configure grouping, select a style, and customize item display limits. To customize your display criteria to the default view:

1. Click **All Documents** (See Figure 48).
2. Click **Edit Current View** (See Figure 48).

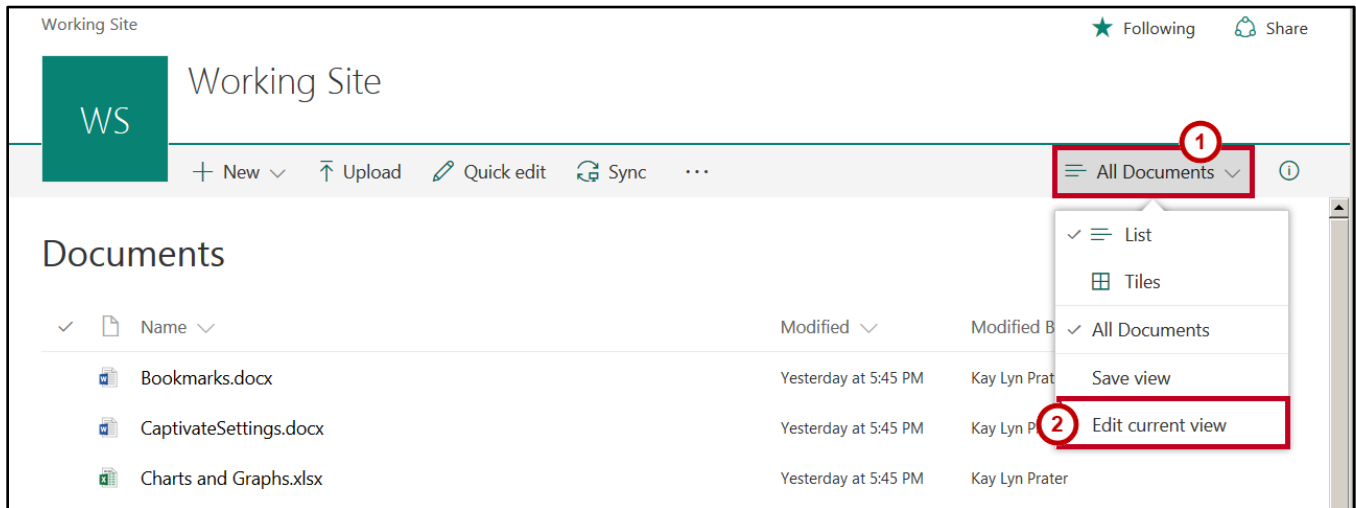


Figure 47 - Edit Current View

3. The *Edit View* window appears containing various sections to allow you to customize your settings. Given that this is the default view, you will not need to edit the view name, but you will edit the view name field as you add other custom views.

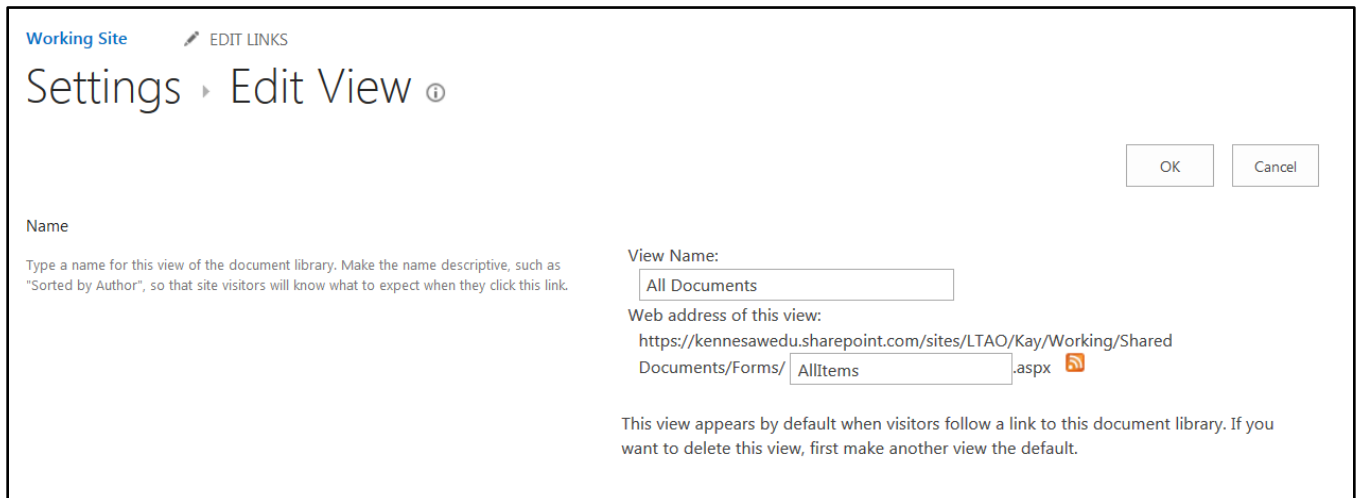


Figure 48 - Edit View

Creating Document Library Views

Creating a document library view allows you to store and retrieve document list with a specific sort and/or filter already applied. To create a new document library view:

1. In the *Quick Launch* pane, click the **document library** in which you want to create the view (See Figure 49).
2. In the toolbar, click **All Documents** (See Figure 49).
3. In the resulting drop-down, click **Save view** (See Figure 49).

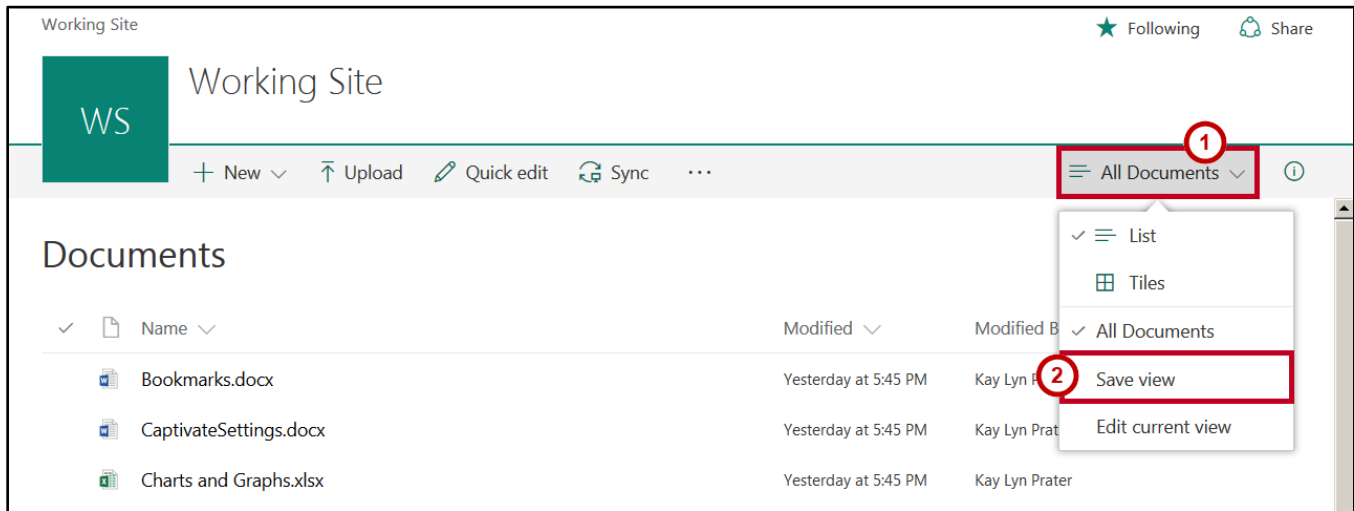


Figure 49 - Save View

4. The *Save as* window opens. Enter a **new name** for your new view (See Figure 50).
5. The *Make this a public view* box is checked by default. To make this a private view for strictly your use, **uncheck** the box (See Figure 50).
6. Click **Save** (See Figure 50).

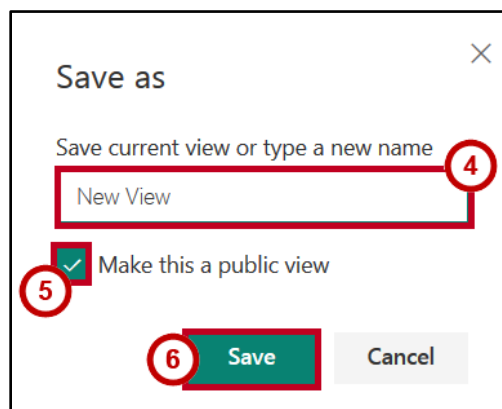


Figure 50 - Create View

- The new view name will be displayed in the toolbar. To edit view settings, click the **View name** (See Figure 51).
- A drop-down menu appears displaying the list view options. In the drop-down, click **Edit current view** (See Figure 51).

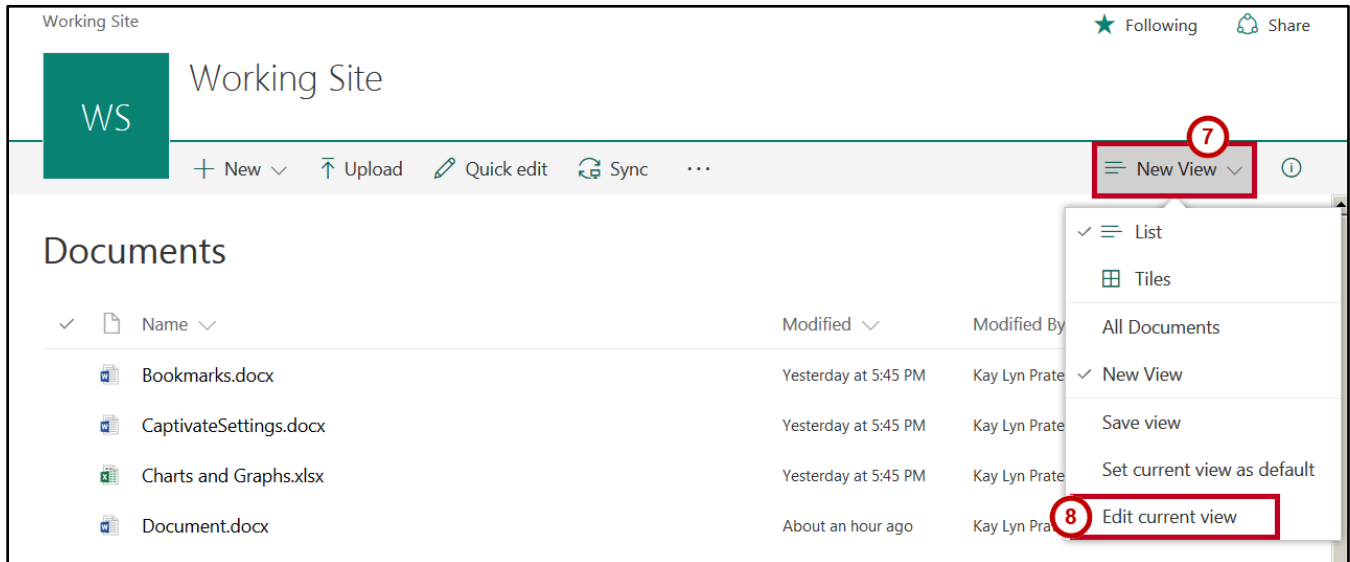


Figure 51 - Edit Current View

- The *Edit View* screen appears with the name you previously entered in the *View Name* field. You may change it at this time if desired. The name will also appear in the web address for this view (See Figure 52).
- If you entered any spaces in the view name, **remove** spaces in the *Web address* field (See Figure 52).
- If you want to make this new view your default view when you first open the document library, click the **check-box** labeled *Make this the default view*. (See Figure 52).

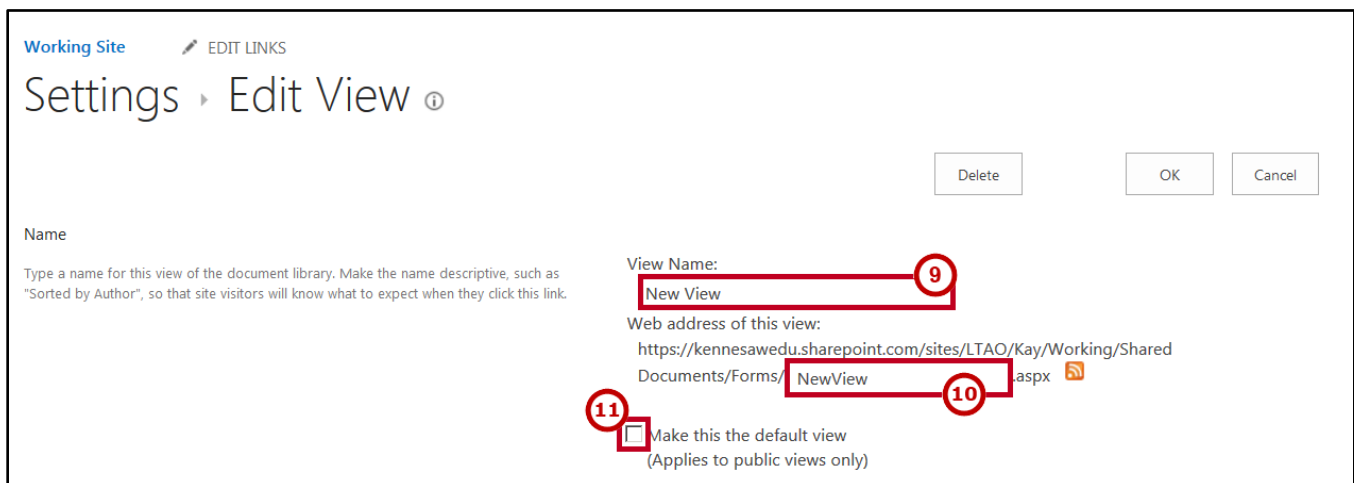


Figure 52 - View Name

12. Select the checkboxes for the **columns** that you want to display in the view, and **set the order of the columns** with the *Position from Left* drop-downs.

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.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Name (linked to document)	2
<input checked="" type="checkbox"/>	Modified	3
<input checked="" type="checkbox"/>	Modified By	4
<input type="checkbox"/>	App Created By	5
<input type="checkbox"/>	App Modified By	6
<input type="checkbox"/>	Check In Comment	7
<input type="checkbox"/>	Checked Out To	8
<input type="checkbox"/>	Content Type	9
<input type="checkbox"/>	Copy Source	10
<input type="checkbox"/>	Created	11
<input type="checkbox"/>	Created By	12
<input type="checkbox"/>	Edit (link to edit item)	13
<input type="checkbox"/>	File Size	14
<input type="checkbox"/>	Folder Child Count	15
<input type="checkbox"/>	ID	16
<input type="checkbox"/>	Item Child Count	17
<input type="checkbox"/>	Name (for use in forms)	18
<input type="checkbox"/>	Name (linked to document with edit menu)	19
<input type="checkbox"/>	Title	20
<input type="checkbox"/>	Version	21

Figure 53 - Select Columns and Position

13. Select the **column(s)** by which you want to sort, and the sort order.

Sort

Select up to two columns to determine the order in which the items in the view are displayed. [Learn about sorting items.](#)

First sort by the column:

None

Show items in ascending order (A, B, C, or 1, 2, 3)

Show items in descending order (C, B, A, or 3, 2, 1)

Then sort by the column:

None

Show items in ascending order (A, B, C, or 1, 2, 3)

Show items in descending order (C, B, A, or 3, 2, 1)

Sort only by specified criteria (folders may not appear before items).

Figure 54 - Select Column Sort Order

14. Select **filter criteria** if you want to see a subset of the documents in the library.

The screenshot shows the 'Filter' settings panel. On the left, there is a title 'Filter' and a paragraph of explanatory text: 'Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type [Today] or [Me] as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. Learn about filtering items.' On the right, there are two radio button options: 'Show all items in this view' (selected) and 'Show items only when the following is true:'. Below the second option, there are two identical filter clauses. Each clause consists of a 'Show the items when column' dropdown menu (set to 'None'), an 'is equal to' dropdown menu, and an empty text input field. Between the two clauses, there are radio buttons for 'And' and 'Or' (selected).

Figure 55 - Select Filter Criteria

15. Select **grouping options** if you would like to group documents by site columns. For instance, you could group the documents first by "Status", and then by "Version".

The screenshot shows the 'Group By' settings panel. On the left, there is a title 'Group By' and a paragraph of explanatory text: 'Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in. Learn about grouping items.' On the right, there are two 'First group by the column:' dropdown menus (both set to 'None'). Below each dropdown are two radio button options: 'Show groups in ascending order (A, B, C, or 1, 2, 3)' (selected) and 'Show groups in descending order (C, B, A, or 3, 2, 1)'. Below these are two 'Then group by the column:' dropdown menus (both set to 'None'), each followed by the same two radio button options for ascending and descending order. At the bottom, there are radio buttons for 'By default, show groupings:' (selected 'Collapsed', 'Expanded') and a text input field for 'Number of groups to display per page:' (set to '30').

Figure 56 - Select Group By Options

16. Select **Totals** to view a list of column names and drop-down boxes to display various totals in the select view.

a. Drop-down boxes are displayed for each column in the selected view.

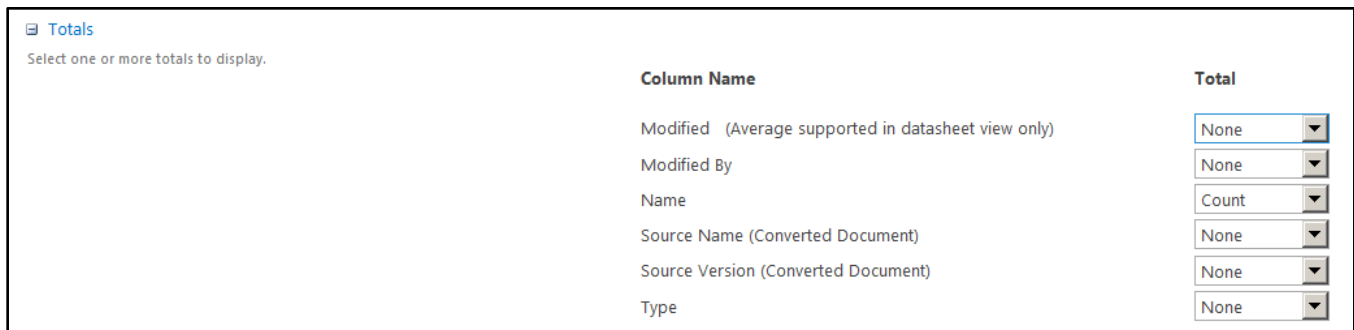


Figure 57 - Column Drop-Down Boxes

b. Depending on the column type, there are options to provide item count, average, maximum, and minimum values (see Figure 58 - Total Item Drop-Down Selection).

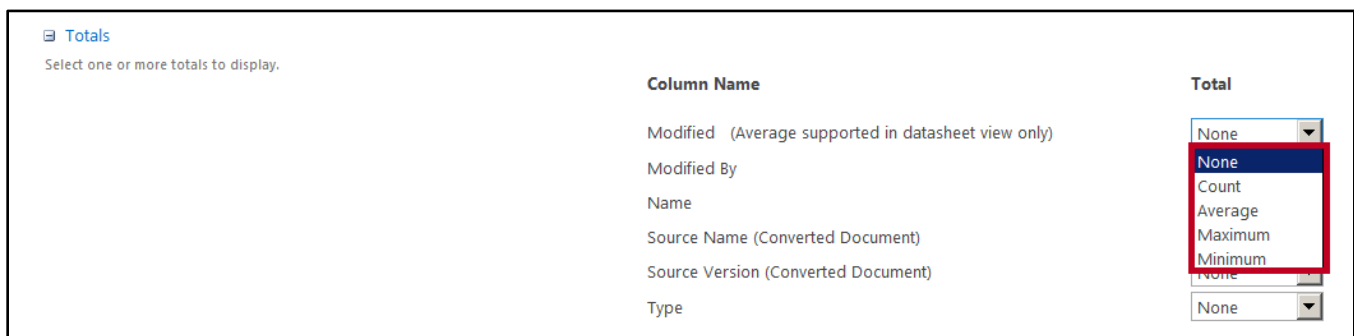


Figure 58 - Total Item Drop-Down Selection

17. Select **Styles** to view a drop-down list of various styles available for your current view. Applying a different style can make the view easier to read.



Figure 59 - Styles Drop-Down

18. The *Folders* section lets you display items either inside folders or without folders.

Folders

Specify whether to navigate through folders to view items, or to view all items at once.

Folders or Flat:

- Show items inside folders
- Show all items without folders

Figure 60 - Folders

19. The *Items* section lets you limit the number of items displayed in the View.

Item Limit

Use an item limit to limit the amount of data that is returned to users of this view. You can either make this an absolute limit, or allow users to view all the items in the document library in batches of the specified size. [Learn about managing large lists.](#)

Number of items to display:

- Display items in batches of the specified size.
- Limit the total number of items returned to the specified amount.

Figure 61 - Item Limit

20. The *Mobile* section lets you create settings for mobile view access to your SharePoint site (See Figure 62).

21. When you have finished selecting all the settings for the View, click **OK** (See Figure 62).

Mobile

Adjust 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:

Field to display in mobile list simple view:

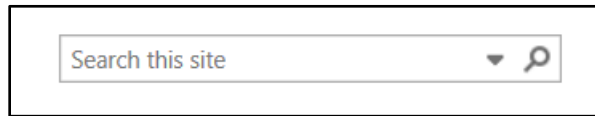
Web address for this mobile view:

Figure 62 - Mobile Settings

Searching for Documents

SharePoint allows you to search for documents located in any document library anywhere on your site using the *Search this site* search box. This will display all content across your site containing that that particular term. To locate content stored in SharePoint:

1. Click the **Search this site** box in the upper right-hand portion of the screen.



2. In the drop-down box, click **Search Everything**.

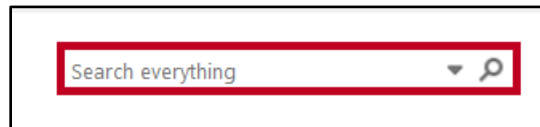


Figure 63 - Search this site

3. Enter the **search words** in the *Search Box* and click the **Search** button.
4. The *Search Results* window will appear.
 - a. The documents containing content related to the term you entered will appear on the right. Simply click on the **content link** to open the document (See Figure 64).
 - b. In the *Quick Launch* window to the left, click on an item listed in **Result type** or **Author** to limit your results (See Figure 64).

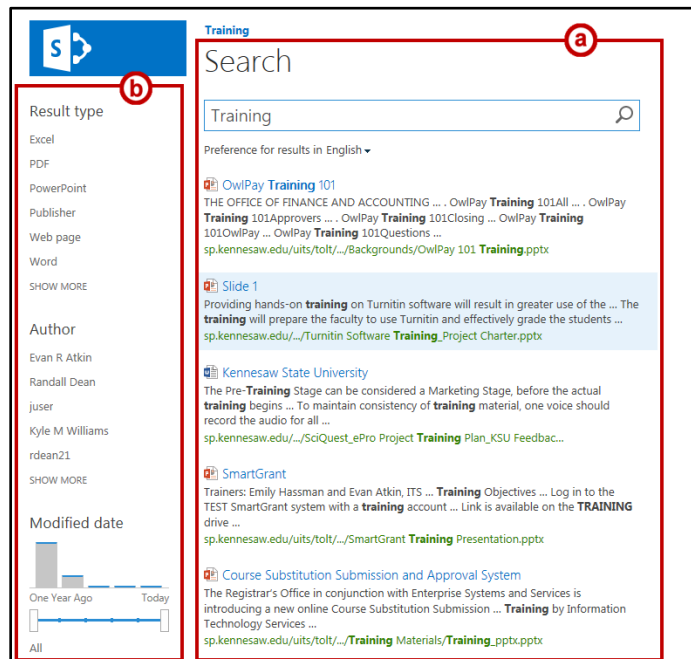


Figure 64 - Search Results Window

You may also search a particular *Document Library* using the search box located at the top of that document library. To search for a document in a document library:

1. Click the **Document Library** you want to search (See Figure 65).
2. Click in the **Search** box above *Quick Launch* (See Figure 65).

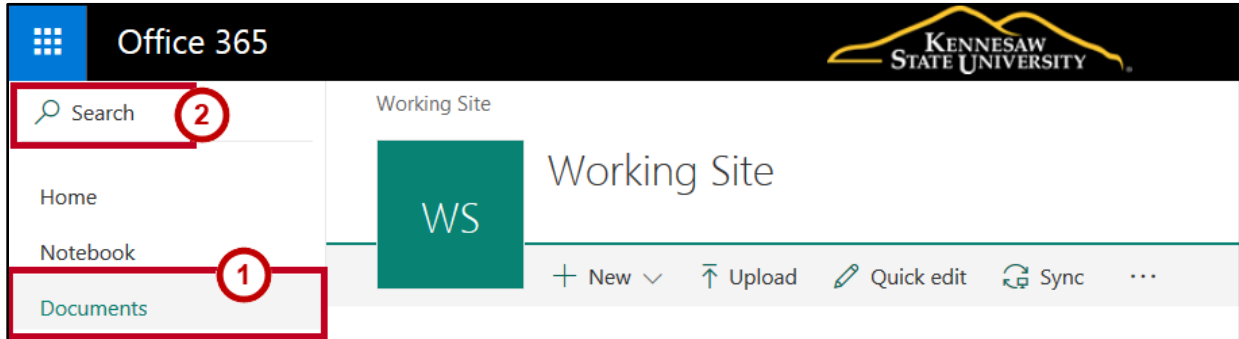


Figure 65 - Document Search

3. In the *Quick Launch Search* box, enter the **search words** for the file(s) you are searching for. As you type, the search box will display the documents that contain text matching your search parameters.

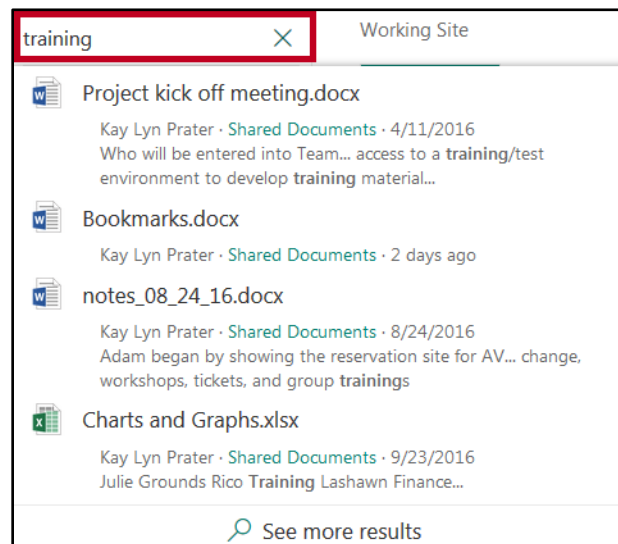


Figure 66 - Document Search

Additional Help

For additional support, please contact the KSU Service Desk:

KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: service@kennesaw.edu
- Website: <http://uits.kennesaw.edu>