Create a Document Library

1. Navigate to Quick Launch, click **Libraries** header**,** and select **Create** [Create]
2. Under Filter By heading, click **Library**, then select **Document Library**
3. Enter Name and click **More Options**
4. Select desired Navigation, Versions, and Template
5. Click **Create**

Create a Column

1. Navigate to desired Library
2. On Ribbon, under Library Tools heading, click **Library** tab [Library Tools Documents Library]
3. From Manage Views group, select **Create Column**
4. Enter column name (example: Department)
5. Select column type (example: **Choice**)
6. **Note**: the Choice column type can be used for Metadata, Keywords, and Tagging
7. Under Additional Column Settings section, select desired fields
8. If using Choice column type, enter choices on separate line (example: HR, Operations, Sales) and at bottom of page clear the Default value box

9. If desired, under Column Validation enter Formula and User message
10. Click **OK**

Edit or Delete a Column
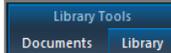
1. Navigate to desired Library
2. Under Library Tools heading, click **Library** tab [Library Tools Documents Library]
3. From Settings group, select **Library Settings**
4. Under Columns section, click desired column
5. Make desired changes
6. To delete column, at bottom click **Delete**
7. Click **OK**

Create a View

1. Navigate to desired Library
2. Under Library Tools heading, click **Library** tab [Library Tools Documents Library]
3. From Manage Views group, select **Create View**
4. Select desired view (example: **Standard View**)
5. Enter View Name (example: By Depts) and select desired Audience

6. Under Columns section, uncheck desired columns (example: Department)
7. Fill out desired options under Sort and Filter sections
8. Under Inline Editing and Tabular View check desired options
9. Scroll down and click the **Group By** section
10. Under "First group by the column:" click drop down arrow and select desired column (example: Department)
11. To Group By another column, under "Then group by the column:" click drop down arrow and select desired column
12. Complete desired sections
13. Click **OK**

Document Library Permissions

Breaking Inheritance:

1. Navigate to desired Library
2. Under Library Tools heading, click Library tab [Library Tools Documents Library]
3. From Settings group, click **Library Permissions**

4. Under Permission Tools heading and from Inheritance group, click **Stop Inheriting Permissions**
5. Read dialog box and click **OK**

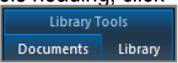**Add:** (Continuation of **Breaking Inheritance**)
1. Under Permission Tools heading and from Grant group, click **Grant Permissions**
2. Use Browse book 📖 to search Users/Groups, **OR** enter Users/Groups, then click Check Names icon 👤✔
3. From Grant Permission sections, add User/Group to a SharePoint group or grant permissions directly
4. Decide whether to Send E-Mail with Personal Message
5. Click **OK**

Edit and Delete: (Continuation of **Breaking Inheritance**)
1. To edit check desired Users/Group box
2. Under Permissions Tools heading and from Modify group, click **Edit User Permissions**
3. Select desired permissions and click **OK**
4. To delete check desired User/Group box
5. Under Permission Tools heading and from Modify group, click **Remove User Permissions**
6. Read dialog box and click **OK**

Create a Document in a Document Library
1. Navigate to desired Library
2. Under Library Tools heading, click **Documents** tab
3. From New group, select **New Document** 📄
4. If prompted to re-enter your password, do so and click **OK**
5. If a warning dialog pops up, click **OK**
6. A new document opens
7. **Note**: Libraries using additional columns for Metadata, Keywords, and Tagging will appear in the Document Properties bar underneath the ribbon
8. Enter desired text then click **Save**
9. The document is now saved directly into the document library in SharePoint
10. When finished, close document

Upload a Document
1. Navigate to desired Library
2. Under Library Tools heading, click **Documents** tab
3. From New group, select **Upload Document** 📄
4. Click **Browse**
5. Select desired document, click **Open**
6. From Upload Document window, select desired settings and then click **OK**
7. Edit Properties page appears

8. **Note**: Libraries may use additional columns for Metadata, Keywords, and Tagging
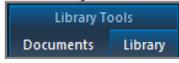9. Complete desired columns and then click **Save**

Read a Document
1. Navigate to desired Library
2. Click the name of desired document
3. If prompted, leave Read-Only selected
4. **Note**: Read-Only will only allow you to view the document without making changes
5. Click **OK**
6. If prompted, click **Open**
7. When finished, close document

Edit a Document
1. From Library, hover over name of document and click drop down arrow, then select **Edit in Microsoft [application]**
2. If prompted with a trust warning, click **OK**
3. If prompted to re-enter your password, do so and click **Ok**
4. Edit file and Save [changes are now saved to library in SharePoint]
5. Close document

Turn On Versioning
1. Navigate to desired Library
2. Under Library Tools heading, click **Library** tab
3. From Settings group, select **Library Settings** ⚙
4. Under General Settings heading, click **Versioning settings**
5. To require content approval, click **Yes**
6. Under Document Version History section, select radio button for either "Create major version" or "Create major and minor (draft) version" to turn versioning ON
7. To require automatic checkout, click **Yes**
8. Click **OK**

Check Out and Check In
1. From Library, hover over name of document and click drop down arrow
2. For **Manual Check Out**, click **Check Out** 📄
3. Check Out window displays, click **OK**
4. Click document drop down arrow and click **Edit in Microsoft [application]**
5. If prompted with "file may harm your computer", click **OK**
6. For **Automatic Check Out**, no need to click check out, just click **Edit in Microsoft [application]**
7. Check Out window displays, click **OK**
8. If prompted with "file may harm your computer", click **OK**
9. Edit file and **Save**
10. Close document by clicking the red **X** in top right corner

11. Check In window displays
12. To **Check In from [application]**, click **Yes** to Check In, enter comments, and then click **OK**
13. If using both Major and Minor versions, select desired Version Type, enter Version Comments, then click **OK**
14. To **Check In from Library**, click **No**
15. From Library click document drop down arrow
16. Click **Check In** 📄
17. Fill in desired fields and click **OK**
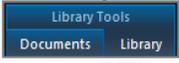
View Version History
1. From Library, hover over name of document and click drop down arrow
2. Click **Version History** 📄
3. To open and read a previous version, click on the actural date and time of the version
4. If prompted, click **OK,** and then click **Open**
5. Opens as [Read Only], review and close
6. **Note**: If using Automatic Check Out, first check out document in order to Restore a previsous version

Create an Alert
Set alert on a library:
1. Navigate to desired Library
2. Under Library Tools heading, click **Library** tab
3. From Share & Track group 🔔 click **Alert Me**
4. Click **Set alert on this library**
5. Fill in desired fields, and click **OK**

Set alert on a document:
1. Navigate to desired Library
2. Click check box next to desired documents
3. Under Library Tools heading, click **Documents** tab
4. From Share & Track group 🔔 click **Alert Me**
5. Click **Set alert on this document**.
6. Fill in desired fields, and click **OK**

Delete a Document
1. From Library, hover over name of document and click drop down arrow
2. Click **Delete** ✕
3. Click **OK** to send to Recycle Bin

Recycle Bin
1. Click **Recycle Bin** located on Quick Launch 🗑
2. Click check box next to desired document
3. To restore, click **Restore Selection** ↩
4. To delete permanently, click **Delete Selection** ✕
5. A pop up window displays, click **OK**