UF Health SharePoint 2010

Document Libraries
# SharePoint 2010 – Document Libraries

1.5 Hours

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1.0 Shared Network Drive vs SharePoint

1.1 Shared Network Drive MetaData

- Limited metadata about the documents
- No ‘Check Out’ options available
- No Versioning - except to manually rename the file to include a version in the title

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<tr>
<td>Best Practices.xlsx</td>
<td>10/2/2012 2:01 PM</td>
<td>Microsoft Excel Worksheet</td>
<td>13 KB</td>
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<tr>
<td>Blank.pdf</td>
<td>9/26/2012 10:56 AM</td>
<td>Adobe Acrobat Document</td>
<td>81 KB</td>
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1.2 SharePoint Library (or List) MetaData

- In the Quick Launch Menu, click Shared Documents
- You see the minimum metadata about the documents

*Display additional built-in metadata in your Shared Documents Library view
- Click the Library tab to open the Library Ribbon
- Click Modify View
- Select these three additional columns *(Check In Comment, Version)*
- Click OK
2.0 Document Management

2.1 Enable Version Control

- In the Quick Launch Menu, click Shared Documents
- Click the Library tab to open the Library Ribbon
- Click the Library Settings icon
- In the General Settings section... Select Versioning Settings

Specify settings for your Document Library
1. Require content approval for submitted items?
2. Create a version each time you edit a file in this document library?
   ** indicate whether major versions, major and minor versions, and number of versions to retain
3. Who should see draft items in this document library?
4. Require documents to be checked out before they can be edited?
5. Click OK
6. Return to the Shared Documents Library

*Any versioning strategy you implement must meet your institutional document management and retention policies.
2.2 Check Out - Edit - Check In

Part One: Check Out

- In the Quick Launch Menu, click Shared Documents
- Hover over the name of the document to be checked out
- Click the checkbox that appears beside the document icon
- Click the Check Out icon
- Click OK

Part Two: Who Checked Out the Document?

- Hover over the ‘Check Out’ arrow beside the document name or look at the ‘Checked Out To’ column

Part Three: Edit the Document

- Hover over the name of the document to be edited
- Click the checkbox that appears beside the document icon
- Click the Edit Document icon
- Make the desired changes and save and close your document

OR

- Click the down arrow next to the document name to be managed
- Select the desired option

Part Four: Check In

- Hover over the name of the document to be checked in
- Click the checkbox that appears beside the document icon
- Click the Check In icon
- Click OK

2.3 Version History

- Click the down arrow next to the document name to be managed
- Select Version History
3.0 Document Organization

3.1 Create/Delete a Document Library and a Folder

Create Library:

- In the Quick Launch Menu, click Libraries
- Click the Create icon
- Filter By: Library
- Click the Document Library icon
- Enter the desired Library name (Curriculum)
- Click Create

Delete Library:

- In the Quick Launch Menu, click Curriculum
- Click the Library tab to open the Library Ribbon
- Click the Library Settings icon
- In the Permissions and Management section... Select Delete this document library
- Click OK
3.2 Explorer View – Open Your Document Library in an Explorer View

You can open any document library within a SharePoint site in Explorer view by selecting the Open with Explorer option on the Library Ribbon.

- In the Quick Launch Menu, click the Shared Documents option
- Click the Library tab to open the Library Ribbon
- Click the Open with Explorer icon
- Drag and drop files into the folder, double-click to open a file or select multiple files for moving, copying or deleting
- Click the close button on the upper right of the window to exit Explorer view

*Please remember that you are not working in Windows Explorer on your local drive. You are viewing your SharePoint content in an Explorer View. Your content resides on the SharePoint Server.

3.3 Map a Shortcut to Your Library via Windows Explorer

- In the Quick Launch Menu, click Shared Documents
- Highlight and Copy the entire URL Path... from https:// just down through Shared%20Documents
  Example: https://intranet.ahc.ufl.edu/wwa/Admin/OCIO/ciodept/EducationalTechnologies/training/sharepointtraining/Socrates/Shared%20Documents
- On your desktop... Right Click My Computer
- Select Map network drive...
- Click on the link: Connect to a Web site that you can use to store your documents and pictures (Next)
- Select Choose a custom network location (Next)
- Paste the Shared Documents URL Path into the Internet or network address dropdown box (Next)
- Type in a name for this network location (Next)
- Click Finish

*You will now see a shortcut link to your Shared Documents Library from within Windows Explorer

*Again, please remember that you are not working in Windows Explorer on your local drive. You are viewing your SharePoint content in an Explorer View. Your content resides on the SharePoint Server.
Create Custom Columns and Input Metadata

**Column One: College**

- In the Quick Launch Menu, click Shared Documents
- Click the Library tab to open the Library Ribbon
- Click the Create Column icon
- Specify settings for your column
  1. Enter a column name (College)
  2. Select the Choice radio button
  3. Type each choice on a separate line (COM, COD, CON)
- Click OK

**Column Two: Semester**

- Again, click the Create Column icon
- Specify settings for your column
  1. Enter a column name (Semester)
  2. Select the Choice radio button
  3. Type each choice on a separate line (Fall, Spring, Summer)
- Click OK

**Input Data:**

- In the Quick Launch Menu, click Shared Documents
- Click the Library tab to open the Library Ribbon
- Click the Datasheet View icon
- Input Data into the College column and the Semester column
  1. For each item in the College column, select the down arrow and choose the desired college
  2. For each item in the Semester column, select the down arrow and choose the desired semester
- Upon completion, click the Standard View icon
3.5 Sort and Filter Current View

- In the Quick Launch Menu, click Shared Documents
- Click the down arrow of the desired column (College)
- Select the desired Sort Order OR Filter (You may also Clear Filter from this column)
  *You may filter on multiple columns where it is logical to do so (College Ascending then Fall Semester)

```
By College
1. Ascending
2. Descending
3. Clear Filter from College
   - COD
   - COM
   - CON
```

3.6 Create New View with Grouped Items

- In the Quick Launch Menu, click Shared Documents
- Click the Library tab to open the Library Ribbon
- Click the Create View icon
- Click the Standard View icon
- Specify settings for your view
  1. Enter a view name (College-Semester)
  2. Scroll down to Group By – First by College, then by Semester, select Collapsed radio button
- Click OK
3.7 Configure Metadata Navigation

- In the Quick Launch Menu, click Shared Documents
- Click the Library tab to open the Library Ribbon
- Click the Library Settings icon
- In the General Settings section... Select Metadata navigation settings
- Select the field(s) you want to display in the navigation hierarchy (All Fields)
- Click Add
- Select the field(s) you want as Key Filter fields (Content Type)
- Click Add
- Select Automatically manage column indices on this list
- Click OK
- In the Quick Launch Menu, click Shared Documents to return

*Look in the Quick Launch Menu to access the Metadata Navigation Folder and Key Filters

3.8 Create a Per-Location View

*First, let’s take a small detour, Click Proj2 folder > Library tab > Datasheet View... Input College & Semester data

*Note: We will utilize the Grouped View previously created in 3.6 above (College-Semester)

- In the Quick Launch Menu, click Shared Documents
- Click the Library tab to open the Library Ribbon
- Click the down arrow in the Current View dropdown box
- Select Configure Views for This Location
- Drill down and click on the Proj2 folder (left-hand side of screen)
- In the Views Available box... Select your desired view (College-Semester)
- Click on Make 'College-Semester' the default view at this location
- Click OK

- Navigate Up... to Shared Documents
- Click on the Proj2 folder (in the Metadata Quick Launch area)....
4.0 Document Set

4.1 Content Type Management

Part One: Allow Management of the Content Types for the Selected Library

- In the Quick Launch Menu, click Shared Documents
- Click the Library tab to open the Library Ribbon
- Select Library Settings
- In the General Settings section... Select Advanced Settings
- Click the radio button to Allow management of content types
- Click OK

*While still in the Library Settings page...

Part Two: Add the Desired Content Type(s) for the Selected Library

- Scroll down to the Content Types section... Select Add from existing site content types
- In the Available Content Types box... Select your desired content type (Document Set)
- Click Add to move the selected Content Type into the Content Types to add box
- Click OK
4.2 Create and Populate the Document Set

Part One: Create the New Document Set

- In the Quick Launch Menu, click Shared Documents
- Click the Document tab to open the Document Ribbon
- Click the New Document down arrow
- Select Document Set
- Enter the document set name and description (SharePoint Intro) (SP Intro Class Documents)
- Click OK

*You must have the document set open to upload documents into it...

Part Two: Open and Populate the Document Set

- In the Quick Launch Menu, click Shared Documents
- Click the Name of the Document Set you wish to open and populate (SharePoint Intro)
- Click the Document tab to open the Document Ribbon
- Click the Upload Document down arrow
- Select Upload Document OR Upload Multiple Documents (Intro2SharePoint.pdf)

If Uploading Multiple Documents...

- Select Upload Multiple Documents...
- Open your Windows Explorer
- “Drive” to the folder location on your computer
- Drag and drop the desired documents into the upload multiple documents form
- Click OK
- Click Done

*Notice that your document set has a ‘folder’ icon...

- In the Quick Launch Menu, click Shared Documents
5.0 Content Organizer - Drop Off Library

5.1 Drop Off Library Setup

Part One: Activate Content Organizer Feature

- On the Site Actions Bar, click Site Actions
- Select Site Settings
- Select Manage site features from the Site Actions group
- Scroll down to the Content Organizer option and click the Activate button on the far right

Part Two: Content Organizer Settings

- On the Site Actions Bar, click Site Actions
- Select Site Settings
- Select Content Organizer Settings from the Site Administration group
- Specify your settings and click OK

Part Three: Content Organizer Rules

- On the Site Actions Bar, click Site Actions
- Select Site Settings
- Select Content Organizer Rules from the Site Administration group
- Click on +Add new item
- Specify your rules and click OK
  (Digital Asset Content Types > Image > Name ends with .png > into Publishing Images)

Part Four: Upload Documents

- In the Quick Launch Menu, click Drop Off Library
- On the List Tools tab, click Documents to launch the Documents Ribbon
- Click the Upload Document icon to open the Upload Document dialog box
- Browse... to the desired document (desktop then SharePoint/Images)
- Choose File to Upload (upload the matching .png file)
- Click Open
- Click OK

**Click the All Site Content link... the image file now resides in the Images area**
6.1 Collaboration, Content and Data Libraries

Collaboration:
- Wiki Page Library
  An interconnected set of easily editable web pages, which can contain text, images and webparts
  Provides a low-maintenance way to record knowledge

Content:
- Asset Library
  Browse and manage rich media assets, like audio and video files
- Document Library
  Store documents or other files that you want to share
  Allows folders, versioning and check out
- Form Library
  Manage business forms like status reports or purchase orders
  Requires a compatible XML editor, such as InfoPath
- Picture Library
  Upload and share pictures
- Slide Library
  Share slides such as PowerPoint
  Provides special features for finding, managing, and reusing slides

Data:
- Data Connection Library
  Share files that contain information about external data connections
- Report Library
  Manage web pages and documents to track metrics, goals and business intelligence information
The Ribbon

SharePoint 2010 uses a Ribbon feature, which groups editing tools into contextual tabs depending on the item that you have selected to edit or insert.
Contact Us

- UF Health IT Training:
  
  http://training.health.ufl.edu/public_contactus.aspx

- Training Registration, Schedules and Handouts Website:
  
  http://training.health.ufl.edu

- SharePoint Services:
  
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