File and Library Commands

Navigate to the library, then follow these quick steps. If a command is grayed out on the ribbon, you may not have the permissions to use it, or you may need to select a file first to enable the command.

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| Add An App | Add a Site Column |
| 1. **Settings** gear > **Add an app** > Click library icon. 2. Enter a name > Click **Create**. | 1. **LIBRARY** tab > **Library Settings** > **Add from existing site columns**. 2. Select site column > **Add** > **Add to default view** > **OK**. |
| Approve/Reject File | Check Out, Check In, Discard Check Out |
| 1. Select file. 2. **FILES** tab > **Approve/Reject** > **Approved**. 3. Add comments > **OK**. | 1. Select file. 2. **FILES** tab. 3. **Check Out**, **Check In,** or **Discard Check Out**. 4. **OK**. |
| Column Default Value | Content Approval |
| 1. **LIBRARY** tab > **Library Settings** > **Column default value settings**. 2. Click column name. 3. **Use this default value** > Enter default value > **OK**. | 1. **LIBRARY** tab > **Library Settings** > **Versioning settings**. 2. **Yes** for **Require content approval for submitted items?** 3. Define **Draft Item Security** > **OK**. |
| Create a Column | Create a View |
| 1. **LIBRARY** tab > **Create Column**. 2. Define name, information type, and additional settings > **OK**. | 1. **LIBRARY** tab > **Create View**. 2. Select view type > Enter view name. 3. Define default status and audience. 4. Choose columns. 5. Define column order, sorting, filtering, grouping criteria, and other view settings. 6. **OK**.   – or –   1. Sort or filter current view > **SAVE THIS VIEW** > Enter view name > Define audience > **Save**. |
| Create View – Personal | Current Page – Navigate through Pages |
| 1. **LIBRARY** tab > **Create View**. 2. Select type of view. 3. Define properties > **OK**. | 1. **LIBRARY** tab > Click previous (**<**) or next (**>**). |
| Current View – Change | Delete Document |
| 1. Click view at top of list. | 1. Select one or more files. 2. **Delete** key > **OK**. |

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| Delete Library | Download a Copy |
| 1. **LIBRARY** tab > **Library Settings** > **Delete this library** > **OK**. | 1. Select file. 2. **FILES** tab > **Download a Copy**. |
| Edit File | Edit or Remove Column |
| 1. Click file name. | 1. **LIBRARY** tab > **Library Settings** > Click column name. 2. Edit column properties or click **Delete**. 3. **OK**. |
| Edit Properties – File | Edit Template |
| 1. Select file. 2. **FILES** tab > **Edit Properties**. 3. **Save**. | 1. **LIBRARY** tab > **Library Settings** > **Advanced Settings**. 2. **No** for **Allow management of content types**. 3. **Open in the client application** for default behavior > **Edit template**. 4. Edit template. 5. Save and close template. 6. **OK**. |
| Email a Link | Folders – Enable Creation |
| 1. **LIBRARY** tab > **E-mail a Link**. | 1. **LIBRARY** tab > **Library Settings** > **Advanced Settings** > Folders section > **Yes** > **OK**. |
| List Name, Description, Navigation | Manage Alerts for Others |
| 1. **LIBRARY** tab > **Library Settings** > **List name, description and navigation**. 2. Change name or description > **Save**. | 1. Select file > **FILES** tab or  **LIBRARY** tab. 2. **Alert Me** > **Set an alert**. 3. Enter user names > Define alert details > **OK**.   – or –   1. **Settings** gear > **Site settings** > **User alerts**. 2. Select user > **Update**. 3. Select alert(s) > **Delete Selected Alerts** > **OK**. |
| Manage My Alerts | Modify or Delete a View |
| 1. Select file > **FILES** tab or **LIBRARY** tab. 2. **Alert Me** > **Manage My Alerts**. 3. View, add, edit or delete alerts. | 1. **LIBRARY** tab > **Modify View**. 2. Change view, delete view or make view the default. 3. **OK**. |
| Most Popular Items | Move File |
| 1. **LIBRARY** tab > **Most Popular Items**. | 1. **LIBRARY** tab > **Open with Explorer**. 2. Cut and paste files. |

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| New Document | New Document Set |
| 1. **FILES** tab > **New Document** > **Document**. | 1. **FILES** tab > **New Document** > Select document set. 2. Enter properties. 3. **Save**. 4. Upload or create documents. |
| New Folder | Open File – Office |
| 1. **FILES** > **New Folder** > Enter folder name > **Save**. | 1. **File** > **Open** > **SharePoint Sites**. 2. Click library > Double-click name of file. |
| Open File – SharePoint | Open with Explorer |
| 1. Click name of file. | 1. **LIBRARY** tab > **Open with Explorer**. |
| Popularity Trends– File | Quick Edit |
| 1. Select file. 2. **FILES** tab > **Popularity Trends**. 3. Open or save spreadsheet with usage details. | 1. **LIBRARY** tab > **Quick Edit** > Make changes. 2. **Stop editing this list**. |
| Rating Settings | Restore Earlier Version of a File |
| 1. **LIBRARY** tab > **Library Settings** > **Rating Settings**. 2. **Yes** for **Allow items in this list to be rated** > Select **Likes** or **Star Ratings** > **OK**. | 1. Select file. 2. **FILES** tab > **Version History**. 3. Hover over date > Click down arrow > **Restore** > **OK**. |
| Restore Selection from Recycle Bin | RSS Feed |
| 1. **Settings** gear > **Site contents** > **RECYCLE BIN**. 2. Select file > **Restore Selection** > **OK**. | 1. **LIBRARY** tab > **RSS Feed** > **Subscribe to this RSS feed**. 2. Enter name > **Subscribe**. |
| Set Alert – File | Set Alert – Library |
| 1. Select file > **FILES** tab > **Alert Me** > **Set alert on this document**. 2. Define details of alert > **OK**. | 1. **LIBRARY** tab > **Alert Me** > **Set alert on this library**. 2. Define details of alert > **OK**. |
| Sort or Filter | Upload (Add) a Document |
| 1. Hover over column header > Click down arrow. 2. Select sort or filter option. | 1. **FILES** tab > **Upload Document**. 2. **Browse** > Select file to upload > **Open** > **OK**. 3. Enter file properties > **Save**. |
| Upload (Add) Multiple Documents | Validation Settings |
| 1. Open Windows Explorer on local computer. 2. Select files to upload > Drag to SharePoint > Release to upload. | 1. **LIBRARY** tab > **Library Settings** > **Validation Settings**. 2. Define formula and message > **Save**. |

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| Versioning Settings | View History – File |
| 1. **LIBRARY** tab > **Library Settings** > **Versioning Settings**. 2. Select **Create major versions** or **Create major and minor (draft) versions**. 3. Depending upon Versioning and Content Approval, define number of major versions, number of drafts, and **Draft Item Security**. 4. **OK**. | 1. Select file. 2. **FILES** tab > **Version History**. |
| View Properties – File |  |
| 1. Select file. 2. **FILES** tab > **View Properties**. |  |