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**.
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