SharePoint

ORGANIZE AND CONFIGURE A SHAREPOINT LIBRARY

There are several ways to organize and manage your SharePoint libraries. This intermediate course teaches you how to create and use folders, sort and filter with columns, create custom views of items in the library, and how to restrict access to a library.

CREATE FOLDERS IN A LIBRARY

- 1. Navigate to the library you want to create a folder in.
- 2. On the Files tab, choose New Folder.
- 3. Enter a name for the folder and choose **Save**.



ADD COLUMNS TO A LIBRARY

- 1. Navigate to the library you want to add columns to.
- 2. On the Library tab, choose Library Settings.
- Scroll down to the Columns section and choose Add from existing site columns.
- 4. Under **Available site columns**, choose and add the columns you want in your library, and then choose **OK**.



CREATE A CUSTOM VIEW OF ITEMS IN YOUR LIBRARY

- 1. Navigate to the library you want to create a view for
- 2. On the Library tab, choose Create View.



- 3. If you want to start from an existing view, choose the view under **Start from an existing view**.
- 4. On the **Settings** page, type a name for the view.
- 5. Choose **Create a Personal View** in the **Audience** section if you don't want others to use this view.

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CREATE A CUSTOM VIEW OF ITEMS IN YOUR

LIBRARY (CONT.)

- 6. Under the Filter section, choose **Show items only** when the following is true.
- 7. In the field drop down box, select the column you want to add, **Due Date** for example.
- 8. In the next field, choose a condition such as **is** equal to, for example.
- In the next field, enter a date you will later filter by, such as 11/15/2014, for example.

Filter		
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	۲	
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.	۲	

D		Show all items in this view
0	***	Show items only when the following is true:
		Show the items when column
		Due Date
		is equal to
		11/15/2014
		And Or
		When column
		None
		is equal to

10. Finally, in the **Folders** section of the page, choose **Show all items without folders**. This option enables you to look at files across folders in a library.



11. Choose **OK**. The new view appears displaying all files having **11/15/2014** under the **Due Date** column, regardless of what folder they are in.

CONTROL WHO HAS ACCESS TO YOUR SHAREPOINT LIBRARY

- 1. Navigate to the library you want to share with colleagues.
- 2. On the **Library** tab of the ribbon, choose **Library Settings**.
- 3. On the **Settings** page choose the **Permissions** for this document library link.
- If the library inherits permissions from a parent site, choose Stop Inheriting Permissions on the Permissions tab.

Office 365	Outlook Calendar People Newsfeed O	OneDrive Sites	Rob Young + 🔅	?
BROWSE PERMISSIONS			🖸 SHARE 🟠 FOLLOW	[0]
Anager Stop Inheriting Permissions In actions	8			
Home Notebook	A This library inherits permissions fr	om its parent. (Rob	Young)	
Documents	Name Name	Type	Permission Levels	
Recent	All Users (membershin)	Domain	Contribute	_
Construction contracts		Group		
Contacts	Everyone except external users	Group	Read	
Sales Team Tasks	Rob Young	User	Full Control	
Important announcements				
Contoso Sales Team Calendar				
Site Contents				
1	791			

- 5. Click **OK** on the message that appears.
- 6. In the **Share** dialog box, type the names or email addresses of those who will have access to the library.
- 7. Optional: Add a short message to tell them about the library, and then select **Share**.
- 8. To remove permissions that existed before you stopped inheriting permissions, select those groups or users and then choose **Remove User Permissions.**

IMPORTANT: Make sure you have permissions to your own library.

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Office 36	55	Outle	ook Calend	ar People	Newsfeed	OneDrive	Sites	Rob Young + 😨	1 2
BROWSE	PERMISSION	s						🗘 SHARE 🏠 FOLLOW	[□]
Delete unique permissions	Grant Permissions	Edit User Permission	Remove User s Permissions	Check Permissions					
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Home Notebook Document Recent Constr	ts ruction contr	acts		is library has n Name All Users (mei Everyone exce	unique perm mbership) ept external (issions. users	Type Domain Group Domain	Permission Levels Contribute Read	1
Sales T Import	Team Tasks tant ncements			Pavel Bansky Rob Young			User User	Edit Full Control	
Contoso S Calendar	iales Team			Sara Davis			User	Edit	
Site Conte	ents								

9. Now, only the people that you added in the Share dialog have access to the documents in the library.

SEE ALSO:

- Sync OneDrive for Business or SharePoint site libraries to your computer <u>http://office.microsoft.com/en-us/support/sync-a-library-to-your-computer-HA102832401.aspx</u>
- Manage lists and libraries with many items <u>http://office.microsoft.com/en-us/office365-</u> <u>sharepoint-online-enterprise-help/manage-lists-</u> <u>and-libraries-with-many-items-</u> <u>HA101967267.aspx?CTT=1</u>