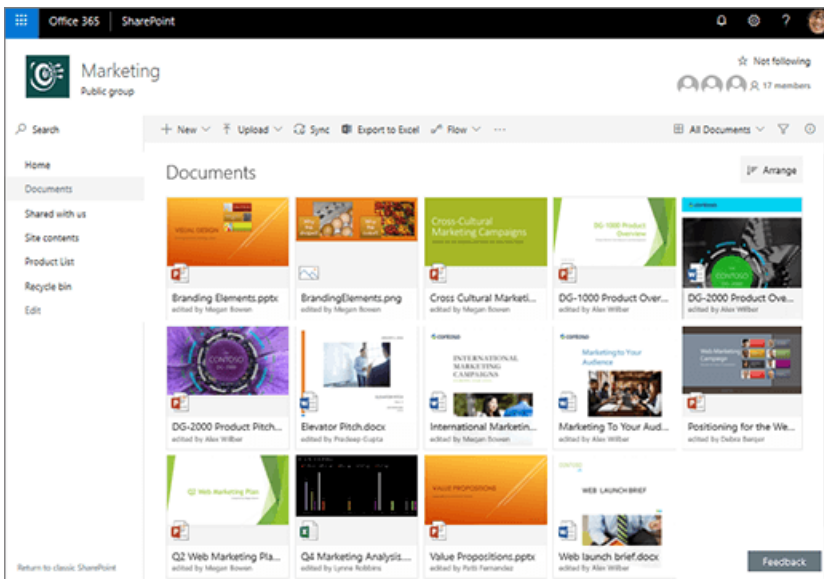




Documents and Libraries

What is a document library?

A document library provides a secure place to store files where you and your co-workers can find them easily, work on them together, and access them from any device at any time. For example, you can use a document library on a site in SharePoint to store all files related to a specific project or a specific client. Adding files or moving files between folders is as easy as dragging and dropping them from one location to another.



Note: Does your screen look different than this? Your administrator may have classic experience set on the document library. If so, see [Introduction to libraries](#). If you're a document library owner, site owner, or administrator, see [Switch the default experience for document libraries from new or classic](#) for the steps to set the default experience.

Note: Some features are currently only available in classic experience. Click **Return to classic SharePoint** in the bottom, left corner of the page to switch to classic experience.

The default site in SharePoint and SharePoint Server 2019 includes a document library and one is created automatically when you create a new site. You can [add additional document libraries to a site](#) as needed. This is useful, for example, if you need to restrict access to a set of files. Each document library displays a list of files, folders, and key information about each, such as who created or last modified a file. You can use this information to organize your files and make it easier to find them.

In a document library, you can:

- Add, [edit](#), [delete a file, folder, or link from a SharePoint document library](#), co-author, and download documents.
- [Control who has access](#) to a library, a folder with in a library, or an individual file within a library.



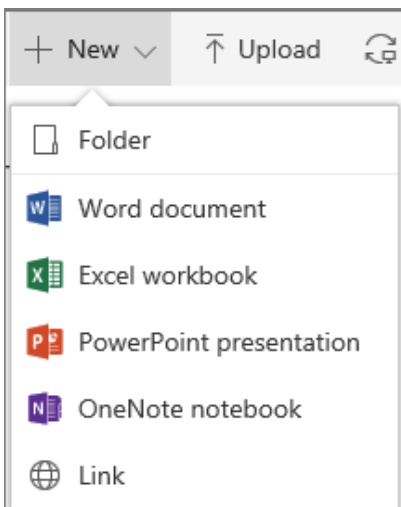
Documents and Libraries

- [Track the activity on a file](#), such as when it was last modified, and receive a notification when something has changed.
- [Create a custom view of a document library](#)
- [Share files or folders with others](#).
- [Add a link in a document library](#) to something that is stored outside the library, for example, a link to a file located in a different library or even a link to an external web page.
- [Highlight a link, file or folder in a document library](#) so you and others can get to them quickly.

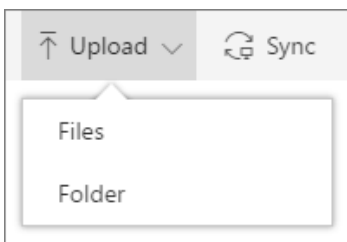
At the top left of the document library page is the main menu.



Here you can create a new folder, document, or a link to something that is located outside the document library,



Note: The list of document types will vary depending on your permissions and how your site was set up. or [upload a folder or files](#).



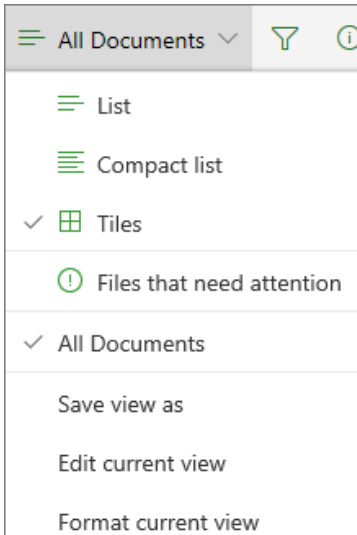
Note: Folders are not currently supported by Internet Explorer.



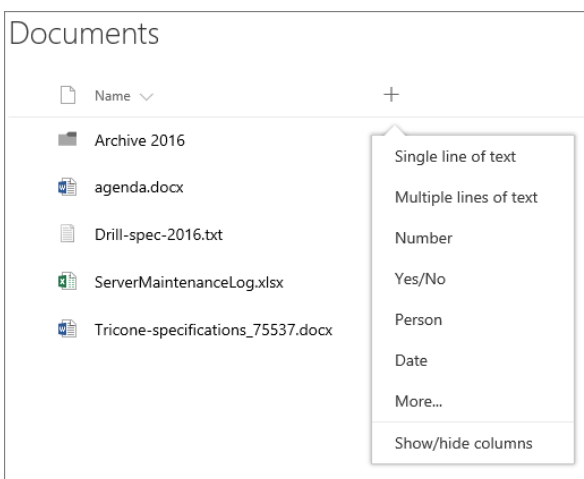
Documents and Libraries

You can also [sync files with the new OneDrive sync app](#) or [create an alert](#) to receive a notification when something has changed.

At the top right of the document library page, click **View options** to change the document library view to List, Compact, Tiles view. If using Internet Explorer, you can open the document library in Windows File Explorer, by clicking **View in File Explorer**. You can also save a [custom view](#) by clicking **Save view as** or, if you are a library owner or administrator, you can edit or create views on the library settings page by clicking **Edit current view**.




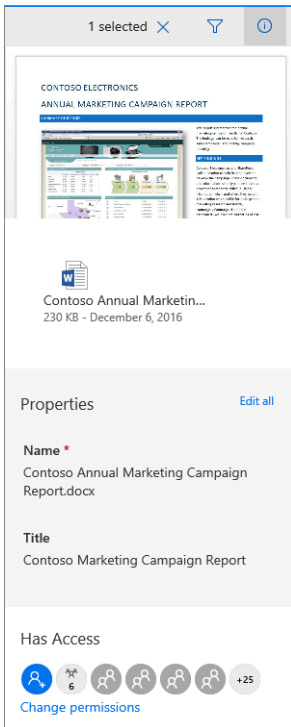
You can add new columns and select the columns to display by clicking **+** or **+ Add columns** on the far right side of the column headers if you're in list view or, if you're in Tiles view, by clicking **Arrange** and then clicking **+** on the far right side of the column headers.



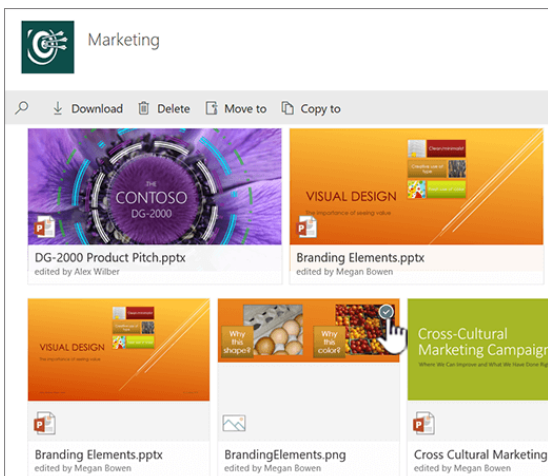


Documents and Libraries

You can [view and edit information about a file or folder](#), such as required properties, recent activity or who a file is shared with, in the information pane. To show or hide the information pane, select a file or folder and click  on the right-hand side of the main menu. You can also view the information pane by right-clicking a file or folder and selecting **Details**.



When you select a folder or file, the menu at the top left of the document library changes to a list of actions you can perform on that folder or file.

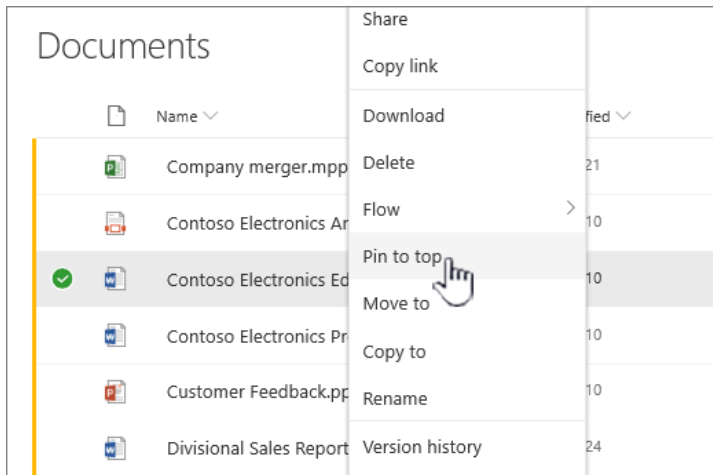


Note: To expose the file or folder menu when in thumbnail view, click the top right corner of the thumbnail.



Documents and Libraries

You can see another version of the document menu by right-clicking the file name or, if in list view, by clicking the ellipses **...** next to the file name. This menu contains additional actions such as **Pin to top** which highlights files so you and others can find them quickly.





Documents and Libraries

Upload files and folders to document library

Usually, a project has at least one file or document that needs to be stored somewhere. For example, there might be a project plan, a report, or a team photo. You can store these items on your site by [adding the files to a library](#). Sometimes, a file might be specific to a certain task in your project. For example, you might be using a site to plan a product release, and one of the tasks in your project is to promote the product at an event that requires travel. You might have a PDF of a map to the event location. You can attach that PDF, or any other related file, to the associated task in your task list.

To attach a file to a task:

1. On the Quick Launch, click **Tasks**.
2. Click the space beside the check box for a task in the task list to select it.
3. On the **Tasks** tab, in the **Actions** group, click **Attach File**.
4. Click **Browse**.
5. On the **Choose File to Upload** dialog box, locate and select the file that you want to attach to the task, and then click **Open**.
6. On the **Attach File** box, click **OK** to upload and attach the file to the selected task.

You can view a file that you have attached to a task by clicking the task name in the task list to open it for viewing. Click the name of the file, next to Attachments, to open it.

To remove a file that is attached to a task:

1. On the Quick Launch, click **Tasks**.
2. Click the space beside the check box for a task in the task list to select it.
3. On the **Tasks** tab, in the **Manage** group, click **Edit Item**.
4. Click **Delete**, next to the file name, which is listed next to **Attachments**.
5. Click **Save** to save the changes.



Documents and Libraries

Check out, check in, or discard changes to files in a library

If you want to make changes to a file on a site and you want to make sure no one else can edit it, check out the file. When you have the file checked out, you can edit it online or offline, and save it—multiple times, if necessary.

When you finish editing and check the file back into the library, other people can see your changes and edit the file, if they have permission. And, if you decide not to make or keep any changes in the file, you can simply discard your checkout so you don't affect version history.

Tip: If you want to edit an Office document at the same time as other people (also called co-authoring), don't check out the document. Just open it and edit it. We recommend turning on [versioning](#) for the library first, though, just in case someone makes a mistake later and you need to restore an earlier version of the document. For more information about co-authoring, see [Document collaboration and co-authoring](#).

When you want to check out and edit a document, whether it's working online, or downloading, do it in the following sequence:

- Check out the document
- Open the document in a supported app or download
- Edit the document
- Save the document or upload
- Check in the document

Check out files


Some libraries are set up to require checkout of files. If checkout is required, you will be prompted to check out any files that you want to edit. When you are finished with the file, you need to check it back in or discard the checkout.

If checkout isn't required in the library, you don't need to check it out as long as you don't mind letting other people edit at the same time as you.

Tip: If your team plans to use co-authoring, we recommend turning on at least major versioning in the library, just in case someone makes a mistake and uploads a document of the same name in a library where everyone is co-authoring. This way, if you lose changes, you can restore a previous version of the document. See [Enable and configure versioning for a list or library](#) for more info.

1. Go to the library where your file is saved. If you're looking at a view of the library on another page, you may have to click the title of the library first. For example, you may have to click **Documents** first to go to the **Documents** library.
2. Select the file, or files, that you want to check out, and then select **Check out**.

Notes:

- In the classic experience, find **Check Out** on the **Files** tab in the ribbon.
- When the file is checked out, the icon next to the file name is partially covered by a green, downward-pointing arrow . This tells you, or anyone else, that the file is checked out. If you point to the icon of any checked-out file, you can see the name of the document and the name of the person who has it checked out.



Documents and Libraries

Check in files

Your files and any changes you make to them, will not be available to your colleagues until you check the files back into your library.

If you downloaded your document to work locally, you'll want to upload it before checking it in. Go to the library where your file is saved. If you're looking at a view of the library on another page, you may have to click the title of the library first. For example, you may have to click **Documents** first to go to the **Documents** library.

1. Select the file, or files, that you want to check in, then select **Check in**.

Note: In the classic experience, find **Check In** on the **Files** tab in the ribbon.

2. In the **Comments** area, add a comment that describes the changes you made. This step is optional but recommended as a best practice. Check-in comments are especially helpful when several people work on a file. Moreover, if versions are being tracked in your organization, the comment becomes part of the version history, which may be important to you in the future, if you need to restore to an earlier version of the file.
3. Click **OK**. The green arrow disappears from the file icon when the file is checked back in.

Discard a check-out

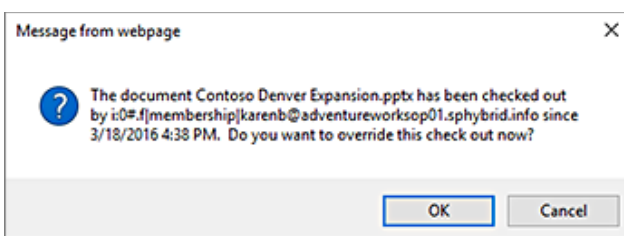
If you check out a file and don't make changes to it, or you make changes that you don't want to keep, you can simply discard the checkout, rather than saving the file. If your organization tracks versions, a new version is created each time you check a file back into the library. By discarding the checkout, you can avoid making new versions when you haven't made any changes to the file.

1. Go to the library where your file is saved. (If you're looking at a view of the library on another page, you may have to click the title of the library first. For example, you may have to click **Documents** first to go to the **Documents** library.)
2. Select the file, or files, that you want to discard changes for, click **Files** and then click **Discard Checkout**.
3. Click **OK** to finish discarding the checkout. The green arrow disappears from the file icon when the file is checked back in.

Check in someone else's document

If you have permission, you can check a file back in that was checked out by someone else.

When you check-in the file, you'll get a warning dialog that the it is checked out to another user. Select **OK** if you want to override and check it in.





Documents and Libraries

See who's got a file checked out

If you need to get to a file but it's checked out, you can view which user has it checked out so you can contact them. To see the user, hover your mouse cursor over the document's icon to get a tooltip pop-up that contains the name of the user that has it checked out.

To check in multiple files at once

You can check files in one at a time, or in a batch. When you check multiple files in, they will all have the same setting for retaining the check out, or comments. Follow these steps.

1. In the document library, select all the files you want to check in by clicking on the check mark to the left of the document's icon.
2. Select **Check in**.
Note: In the classic experience, find **Check In** on the **Files** tab in the ribbon.
3. In the **Comments** area, add a comment that describes the changes you made. This comment will be used on all the files you're checking in.
4. Click **OK**. The green arrow disappears from the file icon when the file is checked back in.



Documents and Libraries

How versioning works in lists and libraries

Versioning overview

Anyone with permission to manage lists can turn versioning on or off for a list or library. Versioning is available for list items in all default list types—including calendars, issue tracking lists, and custom lists. It is also available for all file types that can be stored in libraries, including Web Part pages. For more info on setting up and using versioning, see [Enable and configure versioning for a list or library](#).

Note: If you are a Microsoft 365 customer, versioning is now turned on by default when you create a new library or list, and it will automatically save the last 500 versions of a document. This will help you prevent losing important documents or data. If you have existing libraries or lists on your site or on your team site that do not have versioning enabled, you can turn versioning on for them at any time.

You can use versioning to:

- **Track history of a version** When versioning is enabled, you can see when an item or file was changed and who changed it. You can also see when properties (information about the file) were changed. For example, if someone changes the due date of a list item, that information appears in the version history. You can also see the comments people make when they check files into libraries.
- **Restore a previous version** If you made a mistake in a current version, if the current version is corrupt, or if you simply like a previous version better, you can replace the current version with a previous one. The restored version becomes the new current version.
- **View a previous version** You can view a previous version without overwriting your current version. If you are viewing version history within a Microsoft Office document, such as a Word or Excel file, you can compare the two versions to determine what the differences are.

If your list or library limits versions, you should make sure that contributors are aware that earlier versions will be deleted when the version limit is reached.



Documents and Libraries

Restore a previous version of an item or file in SharePoint

Restore a previous version in SharePoint

1. From the Quick Launch bar, open the list or library.

If the name of your list or library does not appear, select **Site contents** or **View All Site Content**, and then select the name of your list or library.

2. Right click on the space between the item or document name and date, and from the menu, select **Version History**. To see **Version History**, you may need to scroll the menu.

If you don't see Version History, in the dialog, select the ... (ellipses), and then select **Version History**.

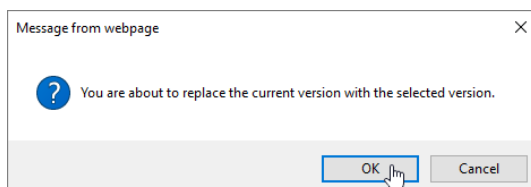
A list of versions of the file appears.

Version history				
Delete All Versions				
No. ↓	Modified	Modified By	Size	Comments
3.0	10/4/2018 2:56 PM	<input type="checkbox"/> Megan Bowen	339.5 KB	Updated title and intro
2.0	9/26/2018 12:50 PM	<input type="checkbox"/> Megan Bowen	339.1 KB	Copy edit
1.0	5/18/2018 1:23 PM	<input type="checkbox"/> Megan Bowen	338.2 KB	

3. In the **Version History** dialog, hover next to the version you want, and to get a list of options, on the right side, select the down arrow. Select **Restore**.

No. ↓	Modified
4.0	5/25/2016 11:05 AM
3.0	<div style="border: 1px solid gray; padding: 2px;"> View Restore Delete </div>
2.0	
1.0	

4. To restore the current version as the latest version, select **OK**.



Note: SharePoint doesn't remove the earlier version you just restored. It creates a copy and makes it the latest version.

Turn on version history in SharePoint

Version History is turned on by default in SharePoint, but if you don't see the **Version History** command, it may be turned off. Depending on how your admin has set up SharePoint, you may be able to turn on list or library versioning.



Documents and Libraries

Delete a previous version of an item or file in SharePoint

Delete previous versions of items or files in SharePoint

1. Go to the list or library for which you want to delete a previous version.

If the name of your list or library does not appear, in the left nav, select **Site contents**, and then select the name of your list or library.

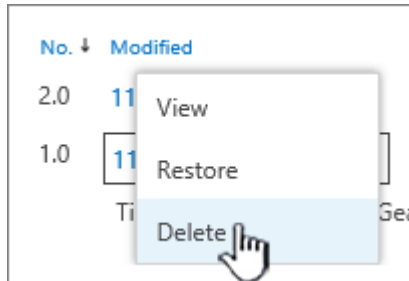
2. Right click on the space between the item or document name and date, and from the menu, select **Version History**. To see **Version History**, you may need to scroll the menu.

If you don't see **Version History**, in the dialog, select the ... (ellipsis), and then select **Version History**.

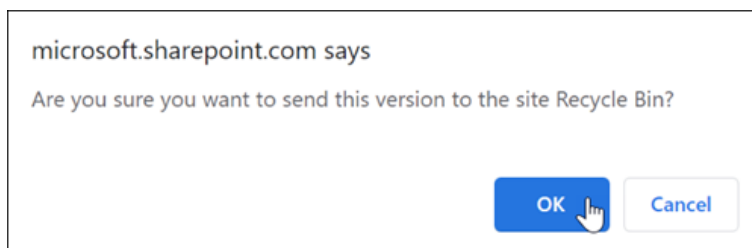
A list of versions of the file appears.

No. ↓	Modified	Modified By	Size	Comments
3.0	10/4/2018 2:56 PM	<input type="checkbox"/> Megan Bowen	339.5 KB	Updated title and intro
2.0	9/26/2018 12:50 PM	<input type="checkbox"/> Megan Bowen	339.1 KB	Copy edit
1.0	5/18/2018 1:23 PM	<input type="checkbox"/> Megan Bowen	338.2 KB	

3. In the **Version History** dialog, hover next to the version you want, and to get a list of options, on the right side, select the down arrow. Select **Delete**.



4. To delete the version, select **OK**.



Note: SharePoint moves versions you delete to the recycle bin. For more info, see [How can I recover deleted versions of items or files in SharePoint?](#)



Documents and Libraries

Delete all previous versions of items or files in SharePoint in Microsoft 365

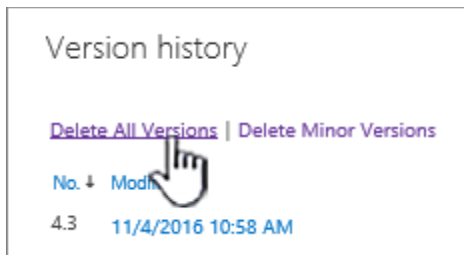
1. Go to the list or library for which you want to delete a previous version.

If the name of your list or library does not appear, select **Site contents** or **View All Site Content**, and then select the name of your list or library.

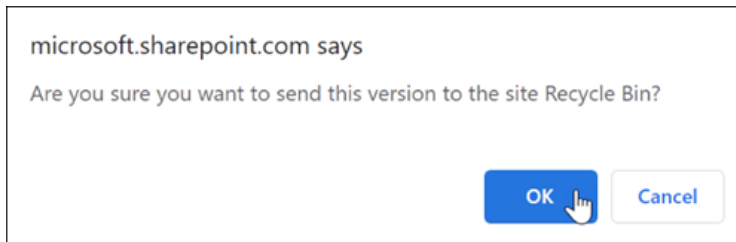
2. Right click on the space between the item or document name and date, and from the menu, select **Version History**. To see **Version History**, you may need to scroll the menu.

If you don't see Version History, in the dialog, click the ... (ellipsis), and then select **Version History**.

3. In the **Version History** dialog, select **Delete All Versions**.



4. To delete all the versions of the file or item you've selected, select **OK**.



How can I recover deleted versions of items or files in SharePoint?

Deleted versions are stored in the SharePoint Recycle bin for up to 90 days. For more info about the SharePoint Recycle bin, see one of the following:

- For SharePoint in Microsoft 365 2016, or 2013, see [Restore deleted content in the Recycle Bin of a SharePoint site](#).
- For SharePoint 2010 see [Restore a deleted object from a SharePoint Recycle Bin](#).
- For SharePoint 2007, see [View, restore, or delete items in the Recycle Bin of a SharePoint site](#).

Local deletions If you deleted your file on your computer, and not from an online library, to restore it, use the Windows recycle bin. You can get to it from the desktop. If it's not there, press the Windows key and then enter recycle. Select either the Recycle bin, or Recycle bin folder.



Documents and Libraries

Create an alert to get notified when a file or folder changes in SharePoint

Get alerts on item changes in SharePoint

You can get an alert whenever a file, link, or folder is changed in a SharePoint document library. Depending on the item (file, folder, link), you may see different options when you set an alert.

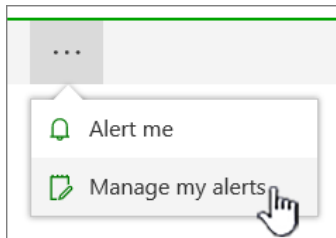
1. Go to the list or library.
2. Select the file, link, or folder for which you want to get an alert.
3. From the list of options for the list or library, select the ... (ellipses), and then select **Alert Me**.
4. In the **Alert me when items change** dialog, select and change the options you want.
5. To save, select **OK**.

Get alerts on all changes in a document library in SharePoint

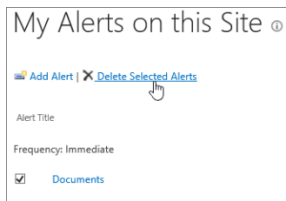
1. Go to the list or library and make sure no items are selected.
2. From the list of options for the list or library, select the ... (ellipses), and then select **Alert Me**.
3. In the **Alert me when items change** dialog, change or fill in the options you want.
4. Select **OK**.

Cancel alerts in SharePoint

1. To view your alerts from a page on the site, from the list of options for the list or library, select the ... (ellipsis), and then select **Manage My Alerts**.



2. Select the alert that you want to delete.
3. Select **Delete Selected Alerts**.



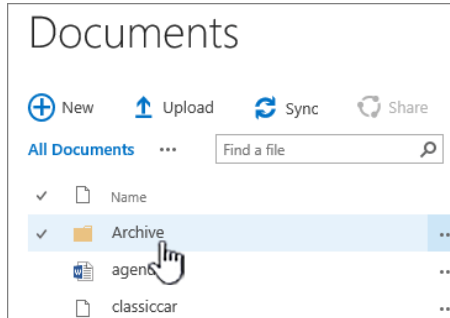
4. To delete, select **OK**.




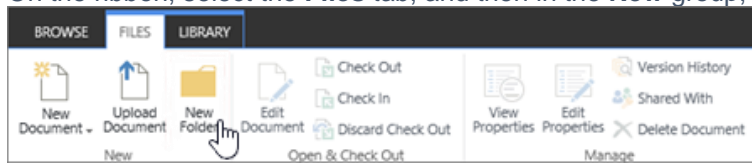
Documents and Libraries

Create a folder in a document library

By default the **New Folder** command is turned on in SharePoint document libraries. A library owner or a user with design permissions can enable the **New Folder** command.



1. Go to the site containing the SharePoint document library where you want to add the folder.
2. Select the title of the library on the Quick Launch bar to open it, or select **Settings** , and select **Site contents**, and then select the title of the library you want to add folders to.
3. On the ribbon, select the **Files** tab, and then in the **New** group, select **New Folder**.



Notes: If the **New Folder** command is not available, you can turn it back on with the proper permissions.

- On the **Library** tab of the ribbon, select **Library Settings**, and then select **Advanced settings**.
- In the Folder section, for **Make New Folder command available**, ensure that the **Yes** option is selected.
- Select **OK**.

4. In the **New Folder** dialog, enter a folder name in the **Name** field, and then select **Save**.

You can optionally invite people to share the folder.

5. When you're done, select **Create**.

Notes:

- **To change the folder name** later on, select ... (ellipses), and in the dialog, select ... (ellipses), and then select **Rename**. In the **Name** field, change the folder name.

If you don't see **Rename**, select **Edit Properties**, and change the **Name** field. When done, select **Save**.

- To quickly go to the next level up in the folder hierarchy, on the ribbon, select the **Library** tab, and then select **Navigate Up**.

Depending on your situation, you might consider using views instead of folders, because they enable content to be filtered, grouped, and sorted in multiple ways. If you have a large library, a combination of views and folders might work best. For more info about views, see [Video: Create and edit public views of a list or library](#).

For more information, please refer to the Microsoft training resource page [HERE](#)