

How to Use Libraries in SharePoint 2010

WHAT IS A LIBRARY?

A SharePoint library is a location on a site where you can create, store, update, and collaborate on files with team members. Each type of library — document, picture, form, and wiki page — displays a list of files and key information about the files, such as who was the last person to modify the file. You can choose from several types of libraries, depending on the types of files that you want to store and how you plan to use them. Once you are done with a library, you can archive files, delete the unused library, and save server disk space.



<input type="checkbox"/>	Type	Name	Modified
<input type="checkbox"/>		Annual Report 2006	6/23/2006
<input type="checkbox"/>		Annual Report 2007	2/1/2007
<input checked="" type="checkbox"/>		Annual Report Template	8/30/2004
<input checked="" type="checkbox"/>		Board of Directors Welcome Speech	9/21/2009
<input checked="" type="checkbox"/>		Marketing Strategy Meeting	9/15/2006

You can also customize libraries in several ways. You can control how documents are viewed, tracked, managed, and created. You can track versions, including the quantity and type of versions, and you can limit who can see documents before they are approved. To streamline, you can use workflows to collaborate on documents in libraries. To reduce clutter, you can specify information management policies to manage the handling and expiration of documents within libraries.

Types of libraries

Some libraries are created for you when you create a new site, such as the Shared documents library in a team site. You can customize these libraries for your purposes, or you can create your own additional libraries. Each type of library has a specific purpose and some have a different set of behaviors and features.

Document library For many file types, including documents and spreadsheets, use a document library. You can store other kinds of files in a document library, although some file types are blocked for security reasons. When you work with programs that are not blocked, you can create those files from the library. For example, your marketing team may have its own document library for planning materials, news releases, and publications.

Picture library To share a collection of digital pictures or graphics, use a picture library. Although pictures can be stored in other types of SharePoint libraries, picture libraries have several advantages. For example, from a picture library you can view pictures in a slide show, download pictures to your computer, and edit pictures with compatible graphics programs, such as Microsoft Paint. Consider creating a picture library if you want to store pictures of team events or product launches. You can also link to pictures in your library from elsewhere on your site, such as from wikis, and blogs.

Form library If you need to manage a group of XML-based business forms, use a form library. For example, your organization may want to use a form library for expense reports. Setting up a form library requires an XML editor or XML form design program, such as Microsoft InfoPath. The form that people fill out is just an .xml file that contains the data (and only the data) that was entered into the form, such as the expense date and the amount. Everything else that makes up the expense report is provided by the form template. After people fill out forms, you can merge the form data or export it for analysis.

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Wiki page library To create a collection of connected wiki pages, use a wiki page library. A wiki enables multiple people to gather routine information in a format that is easy to create and modify. You can also add wiki pages that contain pictures, tables, hyperlinks, and internal links, to your library. For example, if your team creates a wiki site for a project, the site can store tips and tricks in a series of pages that connect to each other.

Ways to work with libraries

Here are some ways to work with libraries and make them more useful for your group:

Create views You can use a view to see the items in a library that are most important to you or that best fit a purpose. The contents of the actual library don't change, but the files are organized or filtered to make them easier to find and to browse in a meaningful way.

Require check-out of files When you require check-out of a file, you ensure that only one person can edit the file until it is checked in. Requiring documents to be checked out prevents multiple people from making changes at the same time, which can create editing conflicts and lead to confusion. Requiring check-out can also help to remind team members to add a comment when they check a file in, so that you can more easily track what has changed in each version.

Track versions If you need to keep previous versions of files, libraries can help you track, store, and restore the files. You can choose to track all versions in the same way. Or you can choose to designate some versions as major, such as adding a new chapter to a manual, and some versions as minor, such as fixing a spelling error. To help manage storage space, you can optionally choose the number of each type of version that you want to store.

Require document approval You can specify that approval for a document is required. Documents remain in a pending state until they are approved or rejected by someone who has permission to do so. You can control which groups of users can view a document before it is approved. This feature can be helpful if your library contains important guidelines or procedures that need to be final before others see them.

Specify permissions SharePoint groups and permission levels help you to efficiently manage access to contents. By default, permissions on libraries, folders within libraries, and documents are inherited from their parent site. Assigning permission levels to a specific item can help you to protect sensitive content, such as a contract or budget information, without restricting access to the rest of the site.

Stay informed about changes Libraries in SharePoint 2010 support RSS technology, so that members of your workgroup can automatically receive and view updates, or feeds, of news and information in a consolidated location. You can use RSS technology to alert you of any changes to a library, such as when files that are stored in the library change. RSS feeds enable members of your workgroup to see a consolidated list of files that have changed. You can also create e-mail alerts, so that you are notified when files change.

Create workflows A document library or content type can use workflows that your organization has defined for business processes, such as managing document approval or review. Your group can apply business processes to

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its documents, known as workflows, which specify actions that need to be taken in a sequence, such as approving or translating documents. A SharePoint workflow is an automated way of moving documents or items through a sequence of actions or tasks. Three workflows are available to libraries by default: Approval, which routes a document to a group of people for approval; Collect Feedback, which routes a document to a group of people for feedback and returns the document to the person who initiated the workflow as a compilation; and Collect Signatures, which routes a document to a group of people to collect their digital signatures

Define content types If your group works with several types of files, such as worksheets, presentations, and documents, you can extend the functionality of your library by enabling and defining multiple content types. Content types add flexibility and consistency across multiple libraries. Each content type can specify a template and even workflow processes. The templates act as a starting point, for formatting and any boilerplate text and for properties that apply to the documents of that type, such as department name or contract number.

Client integration Certain compatible client programs, work with SharePoint features directly from the client. For example, when you use Microsoft Word 2010, you can manage check in and check out more easily. From Microsoft Office SharePoint Workspace 2010 or Microsoft Outlook 2010, you can take library contents offline, work with them from a remote site, and then smoothly synchronize changes when you come back online.

Audit Tracking If you have a group of sensitive files, and it would be helpful to know how the documents were being used, you can define a policy that allows you to enable 'Audit' tracking of events, such as file changes, copies or deletion.

Create a library

1. Navigate to the site where you want to create the library.
2. Click **Site Actions** , click **View All Site Content**, and then click **Create** .

Under **Libraries**, click the type of library that you want, such as **Document Library** or **Picture Library**.

3. In the **Name** box, type a name for the library. The library name is required.
The name appears at the top of the library page, becomes part of the address for the library page, and appears in navigational elements that help users to find and open the library.
4. In the **Description** box, type a description of the purpose of the library. The description is optional.
The description appears at the top of the library page, underneath the name of the library. If you plan to enable the library to receive content by e-mail, you can add the e-mail address of the library to its description so that people can easily find it.
5. To add a link to this library on the Quick Launch, verify that **Yes** is selected in the **Navigation** section.
 6. To create a version each time a file is checked into the library, in the **Document Version History** or **Picture Version History** section, click **Yes**.

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You can later choose whether you want to store both major and minor versions and how many versions of each you want to track.

7. For some libraries, a **Document Template** section may be available, which lists the default programs for creating new files. In the **Document Template** section, in the drop-down list, click the type of default file that you want to be used as a template for files that are created in the library.
8. Click **Create**.

Delete a library

IMPORTANT When you delete a library, you also delete documents, metadata about the documents, version history, library settings and specific permission levels that are associated with the library. Before deleting a library, you should make sure that no one is currently using the library and that no one is going to need the documents. You should also ensure that you understand your organization's process and policies for deleting libraries, which may restrict the permission to delete libraries.

1. Click the name of the library on the Quick Launch, or click **Site Actions**, click **View All Site Content**, and then under the appropriate Libraries section, click the name of the library.
2. Do one of the following:
 - For a picture library, On the **Settings** menu , click **<library type> Library Settings**.
 - For other libraries, under **Library Tools**, click the **Library** tab, and then in the **Settings** group, click **Library Settings**.
3. Under **Permissions and Management**, click **Delete this <library type> library**.
4. When you are prompted to confirm the deletion, click **OK** if you are sure that you want to delete the library.

TIP Depending on how your site is set up, you may be able to recover a library that you accidentally deleted by using the Recycle Bin. Find links to more information about using the Recycle Bin in the **See Also** section.