SharePoint (Insider): Lists and Libraries

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Libraries and lists are two of the most commonly utilized apps in SharePoint. Document libraries, when created well, are much more than simple "document dumps." They are structured repositories that not only contain images, documents, and folders, but are files with a variety of assigned properties that can be used to sort, filter, and group data in personal or private views. Custom lists are very similar to document libraries, however, the only major difference is the information that is collected is not focused around a file. It is the collection of data in rows and columns like you would find in a spreadsheet.

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Topics

Managing Content

Adding, editing, organizing, and deleting list items and library files makes up the bulk of the work when it comes to lists and libraries. Knowing how to manage the content that you store and share with others will keep your apps clean and functional.

Uploading Files (Libraries Only)

1. Navigate to the library you wish to upload files into.
2. Click **Upload**.
3. Click **Browse**.

4. Navigate to the file you wish to upload.
5. Double-click the file.
6. Click **OK**.
7. (If Applicable) Fill in any required metadata fields.
8. (If Applicable) Click **Check In**.

   NOTE: There are several other ways to upload content, but this method ensures that you are prompted to fill in required metadata fields.

Adding List Items (Lists Only)

1. Navigate to the custom list you wish to add an item to.
2. Click **new item**.
3. Fill in metadata fields.
4. Click **Save**.

Editing MS Office Files (Libraries Only)

Microsoft Office files can be edited within SharePoint without having to be re-uploaded.
NOTE: The steps below assume you are not using minor draft versioning or required check in/out settings.

1. Click the name of the file you wish to edit.
2. Click **Edit Document**.
3. Click **Edit in **MS Office Application Name**** to edit in the client application or **Edit in Browser** to edit the file in your browser via Office 365 web applications.
4. Make changes.
5. Save changes.

Deleting Files/List Items

1. Click the ellipses next to the name of the file or list item.
2. Click **Delete**.
3. Click **OK**.

Editing File/Item Details (Metadata)

1. Click the ellipses next to the name of the file.
2. Click **Details**.
3. Make changes in the section that appears on the right side of the screen.

   NOTE: You may need to click "out" of the field you are updating for the save to automatically take *place.*

Quick Edit

You can make quick edits to multiple file and list item properties by opening the list or library's *Quick Edit* page. This enables you to make changes to multiples rows and columns at a time using MS Excel-like keyboard commands including copy and paste.

To make changes with quick edit:

1. Navigate to the custom list or library you wish to make properties changes in.
2. Click **Quick Edit**.
3. Make changes.
4. Click **Exit quick edit**.

Folders (Libraries Only)

You can add folders to document libraries to help organize your files. From within the browser, you can drag and drop files into folders. You can easily create folders within folders as well.

To create a folder:

1. Navigate to the library you wish to create a folder in.
2. Click **New**.
3. Click **New folder**.
4. Type a name for the folder.
5. Click **Create**.

Columns (Metadata)

Creating columns in lists and libraries gives you the ability to add properties, also called metadata, to files and list items. The data gathered in these columns can be used to sort, filter, and group information. The more properties you add to a file or list item, the more options you have for manipulating views of your data. There are a variety of column types that you can add to lists and libraries that are outlined below.

Column Types

Single Line of Text
Add this column to type up to 255 characters of unformatted text.

Multiple Lines of Text
Add this column to type lengthy formatted text.

Choice
Add this column to select a value from a predetermined list of options.

Number
Add this column to type non-monetary numerical values that can be restricted by length.

Currency
Add this column to type monetary values that can be formatted by different currency styles.

Date and Time
Add this column to default or type calendar dates and times.

Lookup
Add this column to lookup values in separate SharePoint lists in your site.

Yes/No (checkbox)
Add this column to display Yes/No values.

Person or Group
Add this column to select UW-Eau Claire user accounts.

Hyperlink or Picture
Add this column to store hyperlinks or display graphics.

Calculated
Add this column to display calculated information based on formulas and/or other columns in the list or library.

Creating Columns

1. Navigate to the list or library you wish to add a column to.
2. Click the **+ Add Column** link found in the right-most column in your library/list view.
3. Type a name for your column.
4. Select a column type.
5. (Optional) Type a description.
6. (Optional) If necessary, make the field required.
7. (Optional) If necessary, set a default value.

   NOTE: Some column types automatically set a default value, which you can choose to remove.
8. Click **OK**.

Editing Columns

Columns that have been created may need to have their settings updated. One common example of this is renaming a column or adding options to a choice field.
NOTE: Be cautious when deleting columns. If you delete a column, it will erase all of the metadata on every file/list item connected to that column.

1. Navigate to the list or library containing the column you wish to edit.
2. Click the gear icon in the upper right corner.
3. Click **List Settings** or **Library Settings**.
4. Select the name of the column found in the *Columns* section.
5. Make changes.
6. Click **OK**.

Adding an Alert (Notification)

You can add an alert to a document library or list so that you're notified when content is added, modified, or deleted at a frequency you choose.

1. Navigate to the document library or list you'd like to receive notifications for.
2. Click the ellipses found in the gray menu bar.
3. Click **Alert Me**.
4. Select the appropriate *Change Type* radio button for which types of notifications you would like to receive.

   *NOTE: Most clients select **New items are added**.*

5. Select the appropriate *When to Send Alerts* radio button for how frequently you would like to receive notifications.

   *NOTE: Most clients select **Send notification immediately.***

6. Click **OK**.