

# Office Hours: Get your docs in a row with SharePoint libraries



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Toni Saddler-French

Feeling a bit like you're paddling upstream when it comes to managing team documents?

SharePoint libraries help people organize documents and keep up with changes, so your team won't feel like it's swimming against the current.

## Applies to

Microsoft Office SharePoint Server  
Windows SharePoint Services

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Do you share documents (a.k.a., "docs") with people at work? Do multiple people have their hands in writing, editing, and reviewing documents? Do feathers fly when too many people work on a document or when deadlines are near?

If you share documents with others, your team might be using — or might consider using — a SharePoint document library. Both Microsoft Office SharePoint Server and Windows SharePoint Services provide document libraries, which are central hubs where your team members can manage documents efficiently. As some might say, it's a place where your team can get its "docs in a row," or become better organized.



## Central location

Does your team store documents all over the place? Perhaps on hard disks, private network folders, in e-mail, and so on? If your team often has to go hunting for documents, a library is a central place that everyone can see and use.

You can create a shortcut in your browser to make it easier to find a library. If you're using Microsoft Office Outlook 2007 and a recent version of a SharePoint product or technology, you can even connect a library to Office Outlook 2007 so that you can view and open your documents from the Mail view. You can find more details on using Outlook 2007 in the **See Also** section.

## Document checkout

When multiple people are working on a file, do people sometimes dip and dive for the same document at once?

When you're using a SharePoint library, you can check out a document, which means that everyone can still see the document, but no one else can change it while you have it checked out.

When you use checkout, you don't have to squawk at a co-worker who has accidentally overwritten your changes.

When you check the file back in, the document is available again and coworkers can see your changes.

## Track versions

Your team can track versions in a document library. When you track versions, you can see who changed what and when. This is especially helpful if you make a mistake and need to restore a previous version – it's like water rolling off a duck's back. If the tides turn in your organization often – for example, if policies change and then change back – versioning makes it easier to keep up or even circle back without recreating content.

Marketing > Marketing Documents > Vendor Guidelines > Version History

### Versions saved for Vendor Guidelines.docx

All versions of this document are listed below with the new value of any changed properties.

Delete All Versions		Delete Minor Versions	
No. ↓	Modified	Modified By	Comments
This is the current published major version			
2.0	8/14/2007 6:58 PM	Ray Chow	Ready for initial input
Author			
1.2	8/14/2007 5:44 PM	Olivier Renaud	Added resources
	Title	Campaign Projections	
	Project	Customer Campaigns	
1.1	8/9/2007 8:58 PM	Connie Vrettos	Updated some figures
1.0	8/8/2007 3:51 PM	Ray Chow	Creating initial version

If you are tracking versions and checking documents in and out, some advice is to enter comments when you check a document in. Then, if you have a restore a previous version at the last minute to stay out of hot water, you have a better chance of scanning the history to find the right version.

## Alerts and RSS Feeds: Don't be a sitting duck

Are you worried about keeping up with content as it changes? You can avoid being a sitting duck by setting up alerts or subscribing to RSS Feeds for a library, if your site is set up to support these technologies.

You can receive alerts by e-mail when content changes, either on the spot or rolled up into a summary. RSS Feeds deliver and consolidate updates in your RSS reader, such as a Web browser or e-mail program, along with any other RSS Feeds. If you already use an RSS reader to keep up with news or other events, then the RSS Feeds are a good option, since you'll have all your updates in one place.

## Manage who can view and edit documents

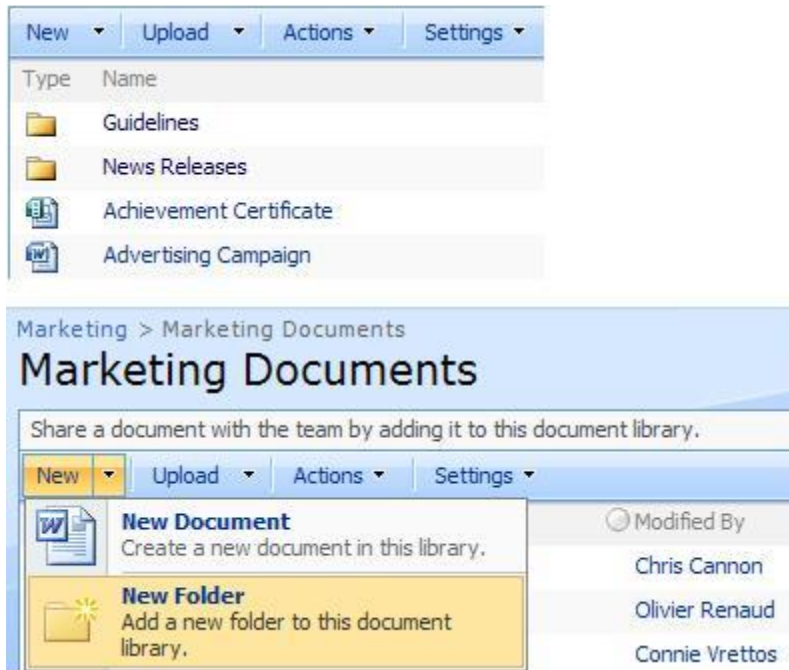
If you're worried that documents will become too public — for example, those juicy list of salaries that might ruffle some feathers if it winds up on someone's blog tomorrow — you might be relieved to learn that your team can manage access to libraries.

Someone who manages your library can set permission levels, including who can view or edit documents. In the most recent versions, SharePoint libraries enable permissions to be set on a per-document basis, in case some documents are more sensitive than others. You wouldn't want to hurt any document's feelings.

## Folders

Are you reluctant to give up the filing system, i.e. the wonderful system of folders and subfolders on your local computer? No worries! Providing that your library owner has enabled folders to be created, you can create you own folder system on the SharePoint site. While folders aren't the only way to organize files — we'll talk about views soon — they're one tool to help you keep your docs in a row when you have many, or distinct types of, docs.

To create a folder, you click the **New** button, and then click **New Folder**. An administrator can specify that folders can't be created, but the default is to allow folder creation.



## Get your docs in a row with columns

One helpful way to get your docs in a row is by using columns, if you are the owner of a library or site. Some people might think of them as properties, fields, metadata, or more simply, information that describes the documents. A column can be a category, a date, or person, or other information that's important to your team.

Columns can make it easy for people to sort and filter documents. People can also create views that show documents that are relevant to a person or situation, such as all documents due this week or all documents assigned to the marketing team.

## Folders versus columns

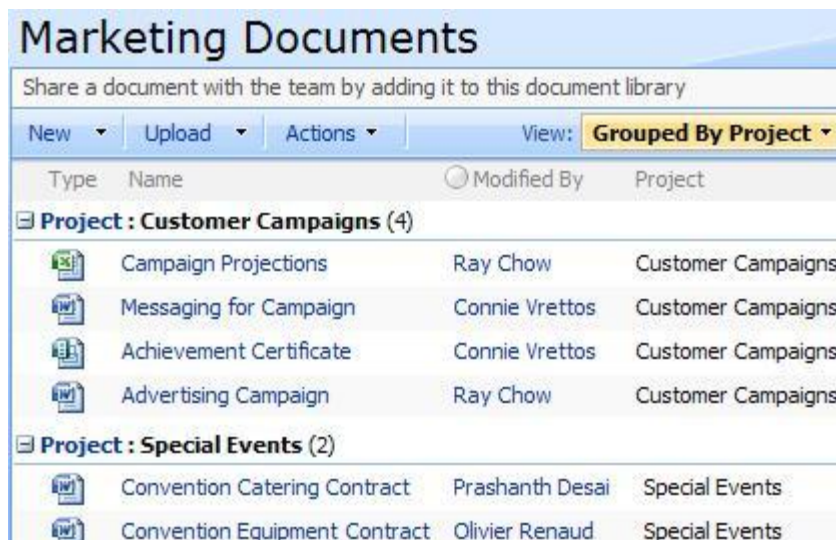
You might be wondering which is better – putting files into folders or leaving them at the same level and using columns to sort and filter. It depends on the numbers of documents, and whether there are multiple ways people will want to organize the files. If you have thousands of documents, then folders are a good option. You can still use columns within the folders to provide additional sorting and filtering.

If you don't have thousands of documents, and expect that people will want to sort, filter, and view the documents in multiple ways across the whole set of documents, then a flat organization with columns might be best. Then, people can use the columns to filter and sort documents on the spot, or create views to show a desired subset of documents.

## Views

Will people want to see all the documents related to a specific project? Or all documents that belong to a particular department? Or perhaps group the documents by the month they are due?

Views provide a handy subset of documents that apply to a specific situation or set of users. Views don't involve moving documents around, but just setting up certain criteria based on columns. If you can contribute to a library, you can create a personal view. If you own a library, you can create public views that other people can use.



The screenshot shows a SharePoint document library interface. At the top, there's a title bar 'Marketing Documents' and a subtitle 'Share a document with the team by adding it to this document library'. Below this is a navigation bar with 'New', 'Upload', and 'Actions' buttons, and a 'View: Grouped By Project' dropdown menu. The main content area is a table with columns for 'Type', 'Name', 'Modified By', and 'Project'. The table is grouped into two sections: 'Project : Customer Campaigns (4)' and 'Project : Special Events (2)'. Each row in the table includes a document icon, the document name, the author's name, and the project name.

Type	Name	Modified By	Project
<b>Project : Customer Campaigns (4)</b>			
	Campaign Projections	Ray Chow	Customer Campaigns
	Messaging for Campaign	Connie Vrettos	Customer Campaigns
	Achievement Certificate	Connie Vrettos	Customer Campaigns
	Advertising Campaign	Ray Chow	Customer Campaigns
<b>Project : Special Events (2)</b>			
	Convention Catering Contract	Prashanth Desai	Special Events
	Convention Equipment Contract	Olivier Renaud	Special Events

## Go with the flow

If getting your documents through review and approval feels like paddling upstream, consider using workflows.

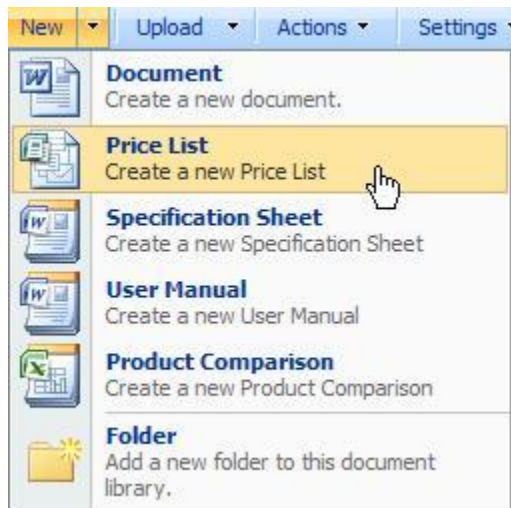
Basically, a workflow is a process that guides who performs which steps and in what order. has some basic workflow features that can be extended, and Office SharePoint Server 2007 provides additional workflow features out-of-the-box.

## Other content management features

If your team frequently works on the same types of documents, and those documents have unique needs, consider using content types. They are basically collections of templates, properties, and workflows that apply to a specific type of document, like a price list or specification sheet.

You can create the content types for a whole group of related sites, known as a site collection, and then add them to any library where you need them. That way, your company or division can have a consistent approach to content.

When a library supports multiple content types, they are added to the **New** menu. When users click **New**, they can get a head start by choosing the specific content type.



## Other enterprise content management features

If your team is flooded with content, consider exploring additional enterprise content management features in Microsoft Office SharePoint Server 2007. Some key features include Web publishing, Web content management, document policies, and document labels for tracking, and more. For more information, see the links in the **See Also** section.

## About the author