# Using the document library

Upon completing the steps in this set of instructions, you will have performed the following:

- Upload a document to the document library
- Find a document
- Replace a document
- Delete a document

## Upload a document to the document library

Before you upload your document to the SharePoint library, make sure you have saved it with a short, descriptive web-friendly file name (see Page Design > Documents for more help). The file name of this example document (titled Guidebook for Patients) is patient-guidebook.pdf.
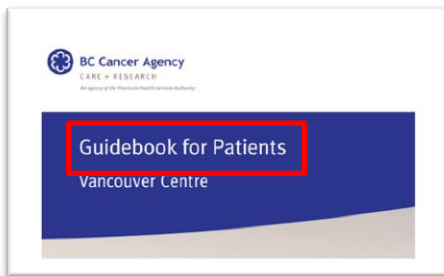

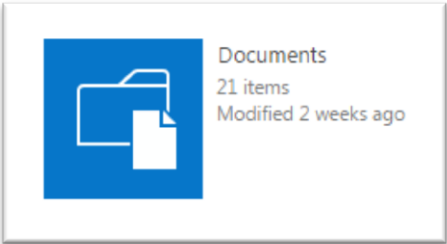In the editing site, navigate to your page.
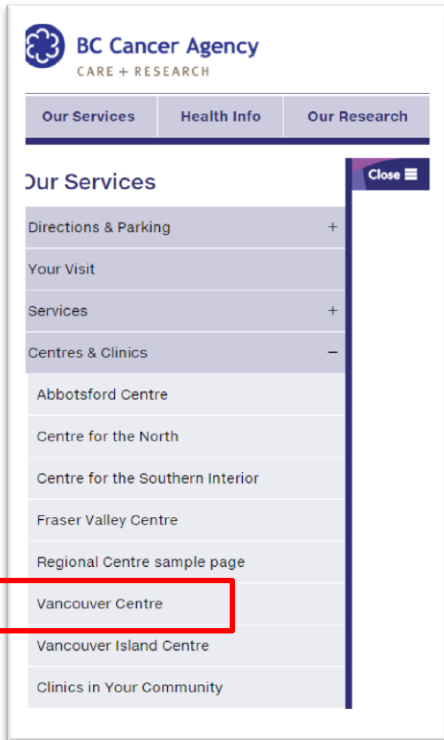
From the cogwheel, choose Site contents. (You do not need to go into Edit mode at this point.)
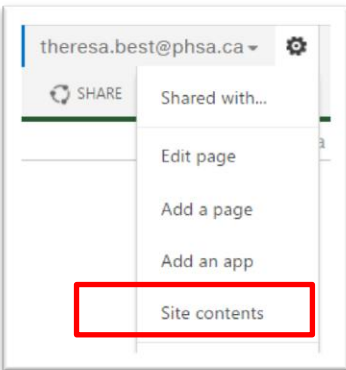

The Site Contents for your page will appear. Note that Site Contents look similar regardless of the page you are on. Check that you are in the correct Site Contents by looking at the URL bar. The address might not be exactly the same as your page, but it will be similar enough for you to confirm that you are in the correct Site Contents. If you are not in the correct Site Contents, you can either start again, or navigate to the correct library using the left menu.
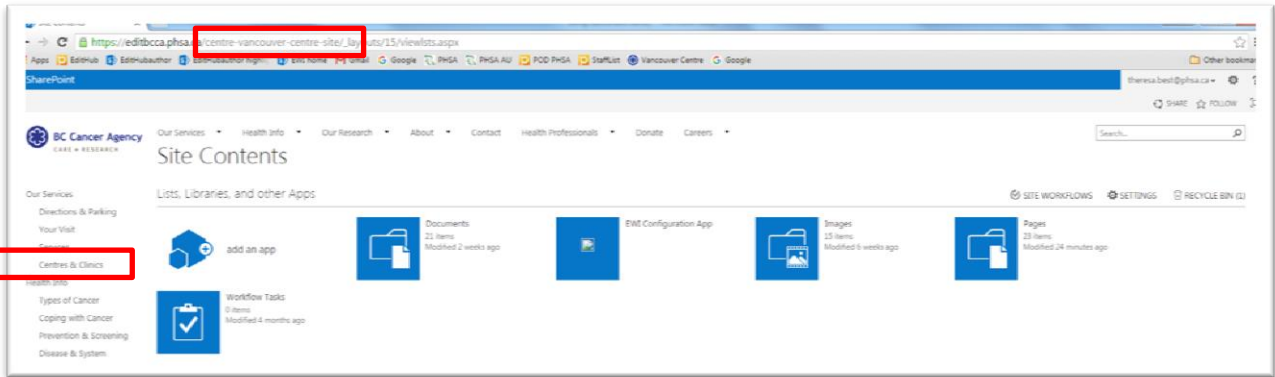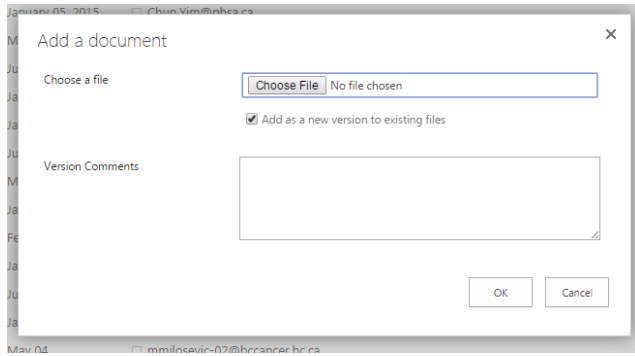
In the Site Contents, find the Documents icon and click it to open it.

The Document library for your page will appear. (You might want to check that you are in the correct Documents library by looking at the URL bar.)
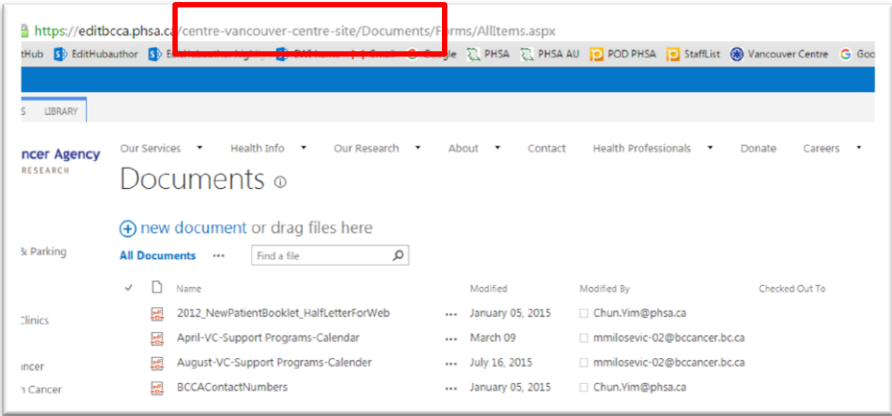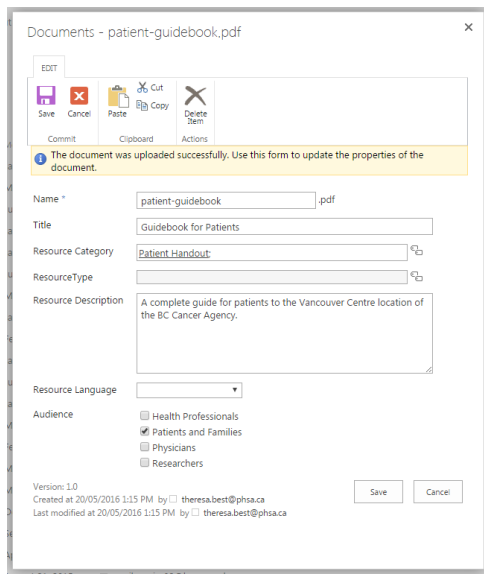

Click New Document. The Add a document pop up will appear.

Click Choose File, navigate to where you have saved your document, and select it.

The document file name will appear in the Add a document pop up. Add version comments if you need to and click OK.

The Documents popup for your document will appear.

The Document popup is the metadata record; it helps search engines find your content. Fill in the fields as follows:

- **Name** – this field will show with the file name already in the field. If the file name is not the name you want, you must resave your document under the correct file name and re-upload it to SharePoint. If you change the file name in the Documents metadata popup you will create an error
- **Title** – the full name of the document
- **Resource Category** – click the little flag to the right of the field. When the Select Resource Category popup appears, navigate to the tag that describes your document, select it, and click OK.
- **ResourceType** – this tag is being developed

- **Resource Description** – add a brief sentence describing the content of the document
- **Resource Language** – ignore this if the document is in English; if it is not in English, select the language of the document from the drop-down list
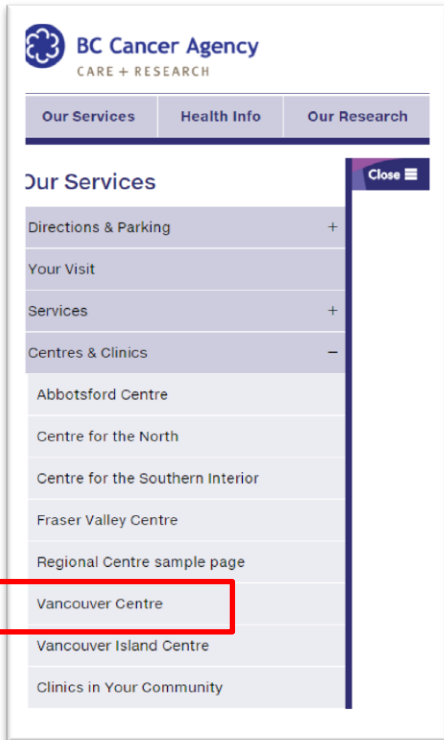- **Audience** – select the audience for the document (who it is written for)

Click Save. The Documents library for your page will appear, with your document added and a "new" icon beside it. Documents are added by file name in alphabetical order.
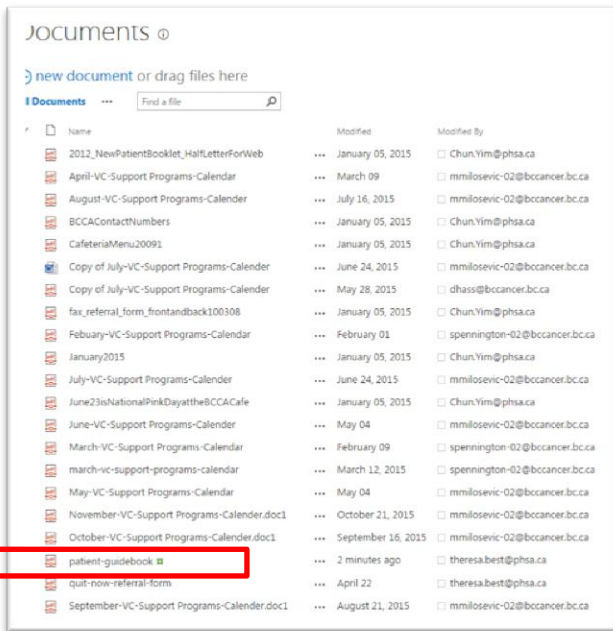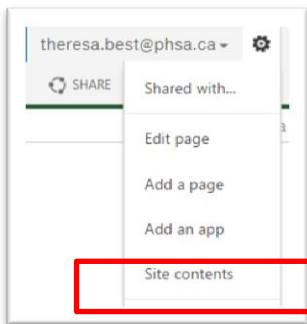

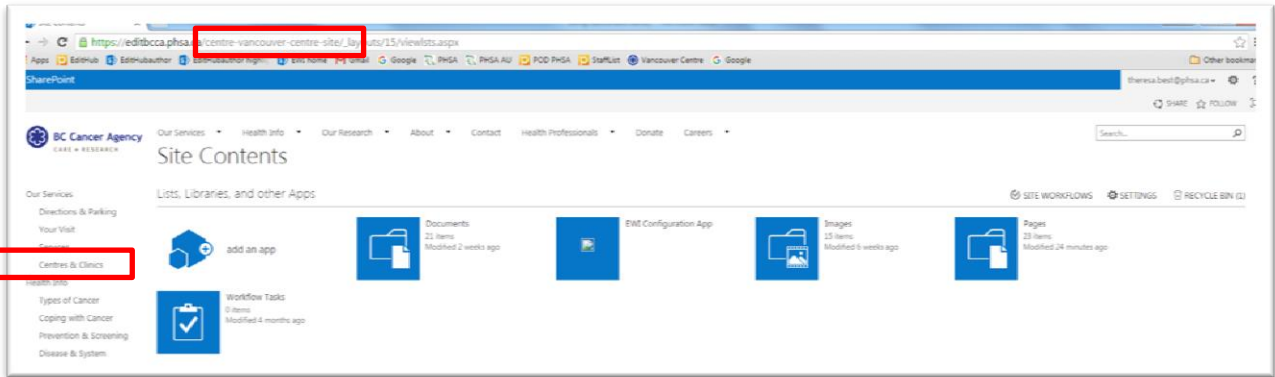# Find a document

Find a document in the Site Contents
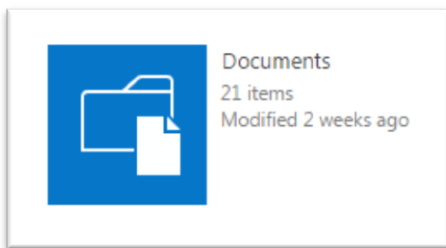In the editing site, navigate to your page.

From the cogwheel, choose Site contents. (You do not need to go into Edit mode at this point.)


The Site Contents for your page will appear. Note that Site Contents pages look similar regardless of the page you are editing. You can check that you are in the correct Site Contents by looking at the URL bar. (The address might not be exactly the same as your page, but it will be similar enough for you to confirm that you are in the correct Site Contents.) If you are not in the correct Site Contents, you can either start again, or navigate to the correct library using the left menu.

In the Site Contents, find the Documents icon and click it to open it.

The Document library for your page will appear. (You might want to check that you are in the correct Documents library by looking at the URL bar.)
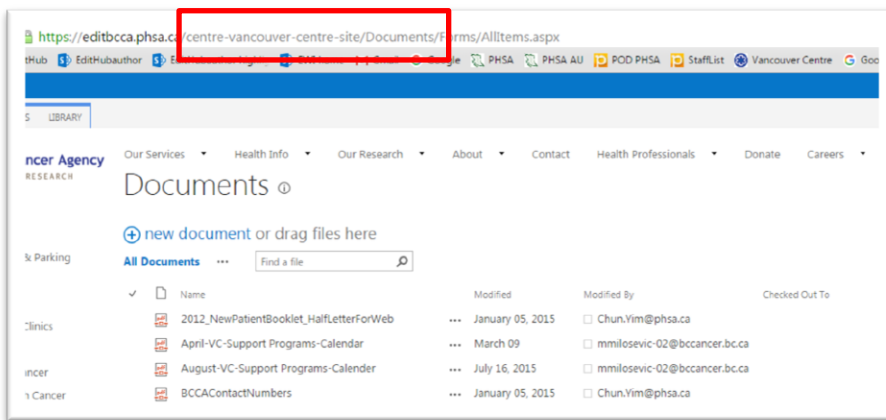
Documents are listed in the Documents library alphabetically by file name. Look for the file name of your document. If there are many documents in your Documents library, you might need to scroll through pages. Click the right arrow at the bottom of the list on each page to scroll through pages.

Documents are listed with an icon showing what kind of document it is, the document file name, an ellipsis (when clicked, a menu of options pops up), and the date the document was last modified and by whom.
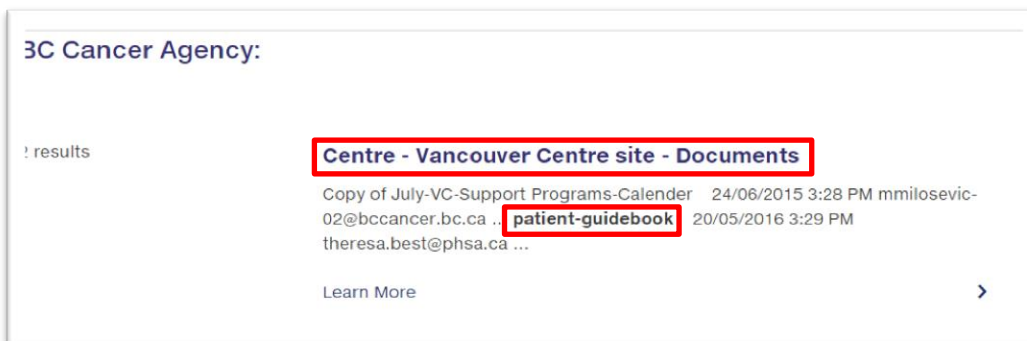

Find a document by file name or keyword
You can also find a document by searching by file name or keyword.

To search by file name, enter the document file name into the main site search tool.
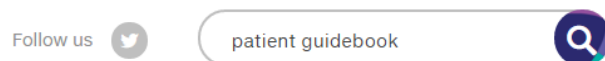

If a document by that file name exists, the search result will display name of the site in which the document has been placed.
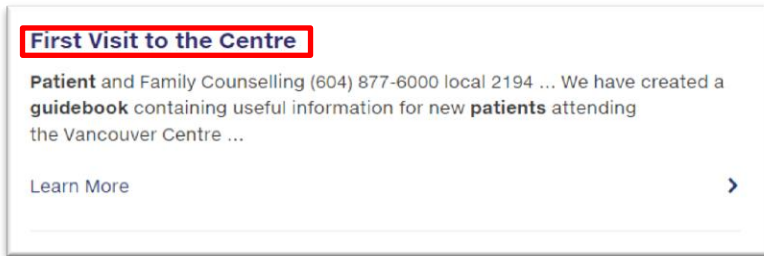

You can then navigate to that site in the site contents to find your document.

To search by key word, enter the key word into the main site search tool.

The search result will display the names of pages that contain the key word or key words.

First Visit to the Centre

Patient and Family Counselling (604) 877-6000 local 2194 ... We have created a **guidebook** containing useful information for new **patients** attending the Vancouver Centre ...

Learn More   >

Click on the page title to open the page, and look through the page to see if your document has been placed on it. When you hover over a document link, the url of the document appears in the bottom of your screen, and the metadata for the document will appear. Both of these pieces of information should be able to help you decide if this is the document you are looking for. If this is the right document, look at the url bar to see its location.
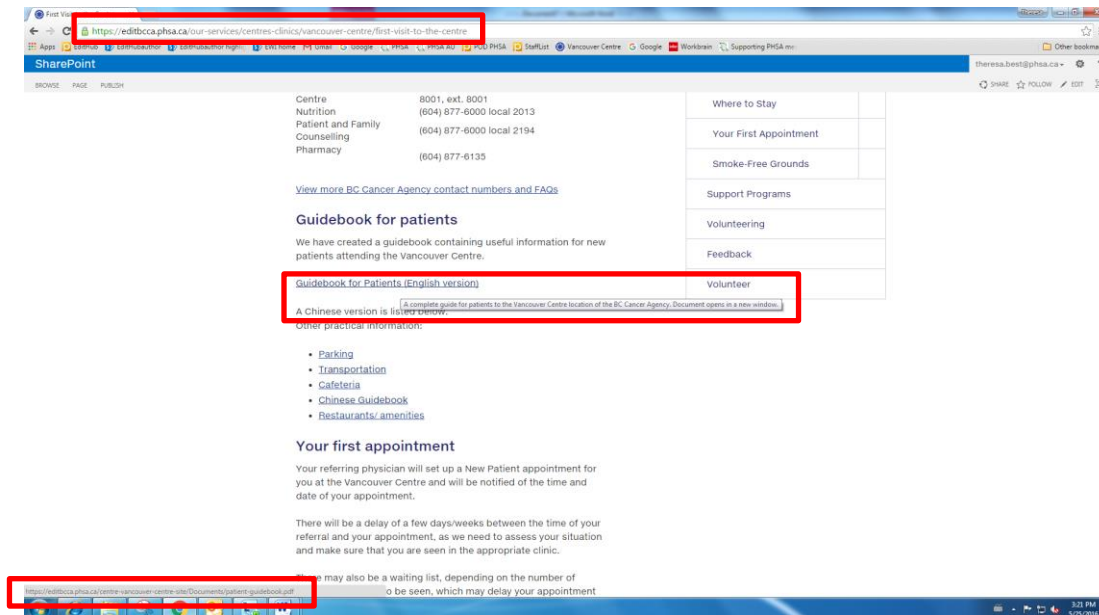

Replace a document

Sometimes you need to replace an out-of-date document with an updated version of the same document.

You can upload a new version of a document and link to the document in a single series of steps. However, your old document **must** have exactly the same name as your old document. For example, if you have updated an old document called **clinic-referral-form.doc** you must save your new document on your desktop first, with exactly the same file name **clinic-referral-form.doc** in order to make the replace a document process work correctly in Sharepoint.

- If your new document has exactly the same file name as your old document, Sharepoint will automatically put the new document in the old document's place (including attaching it to the existing document record), and all links to the old document will not break.
- If your new document has a different file name, Sharepoint will upload a separate document (including creating a new document record), and all links to the old document will break.

In the editing site, navigate to your page. Place your cursor on the link to the document that you want to replace. In this screenshot, the link is Guidebook for Patients (English version). The green Link tab will appear. Click the tab.
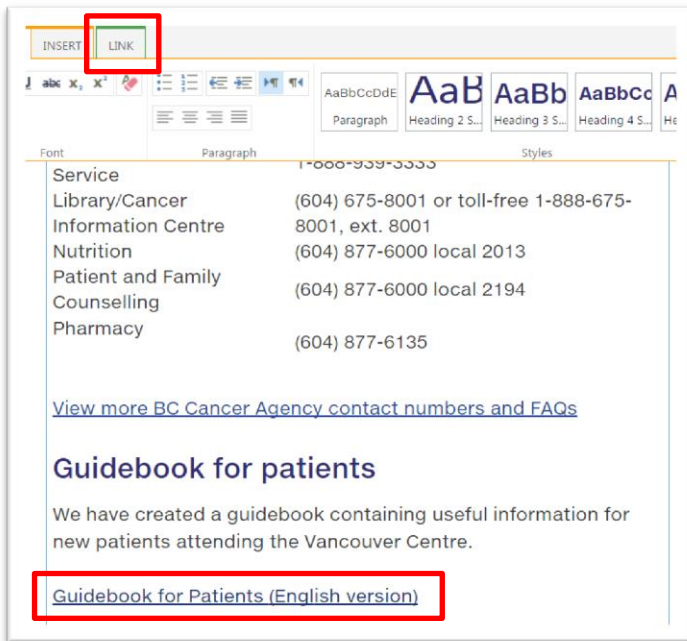

In the Link tab, click Select Link.
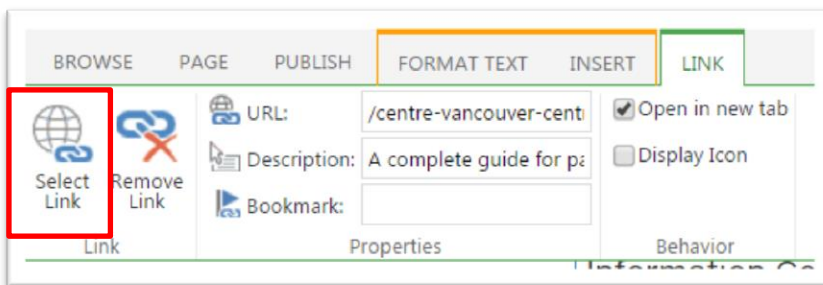
The Select an Asset panel for your Documents library will appear. Check that you are in the correct site (by looking at the Current Location line at the top of the page). Click "Click to add new item" at the top of the panel. The Add a document panel will appear. Navigate to the item on your desktop, select it and click OK. The document record for your document will appear, with the Name (document file name) and Title (document title) fields filled in. Click Save.
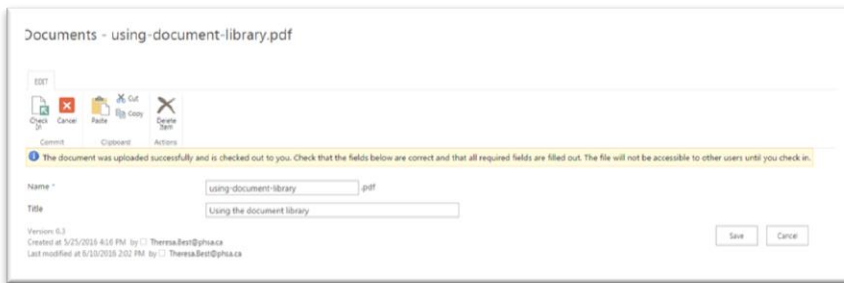
The Select an Asset panel will appear. Navigate to the document you just uploaded. In this screenshot, the document is **using-document-library.pdf**. (The Modified column indicates when the document was uploaded.)
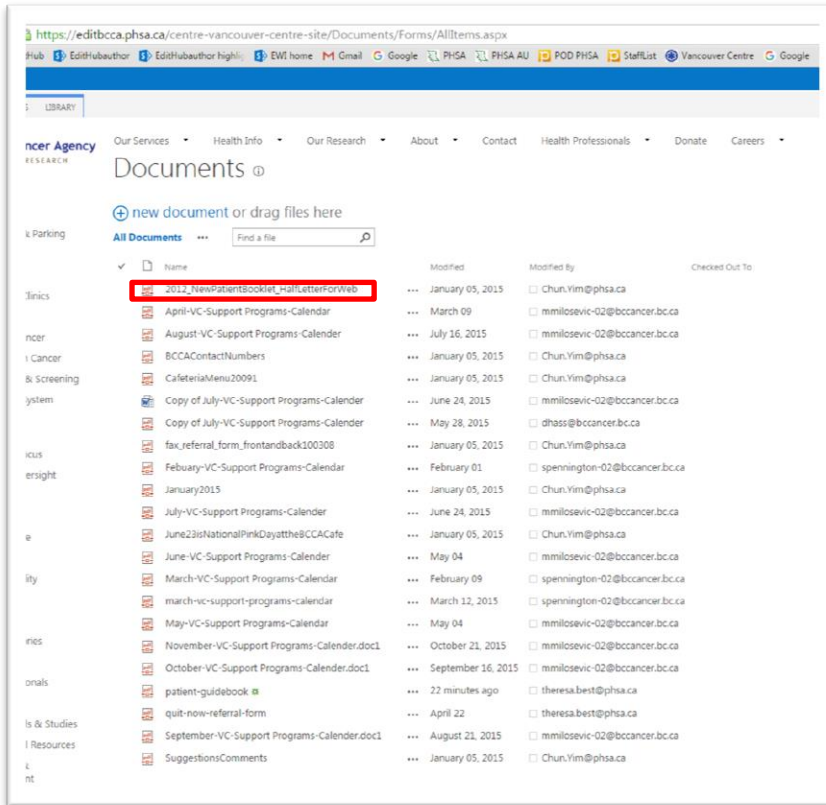
Select your new document. The document will appear in the Location (URL) field. Click Insert.
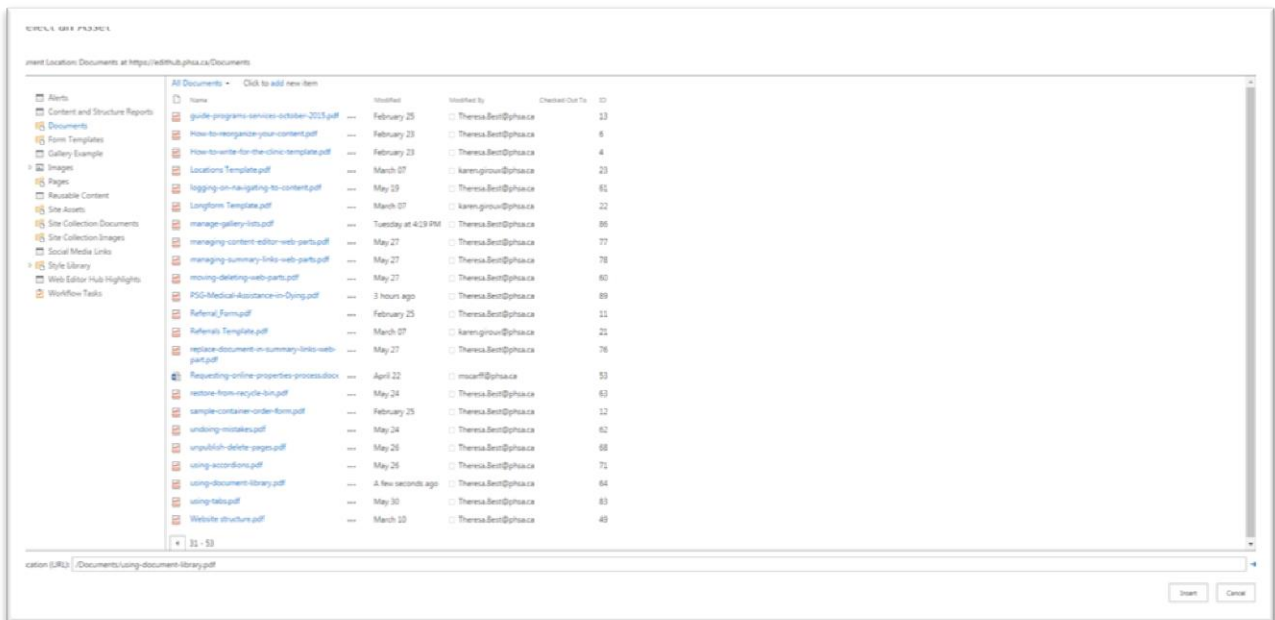
The new document will appear on the document link on your page.

Delete a document

To delete a document from the library, go the Site Contents for your section. Find the document you want to delete. In this example, I want to delete: 2012_newPatientBooklet_HalfLetterForWeb.
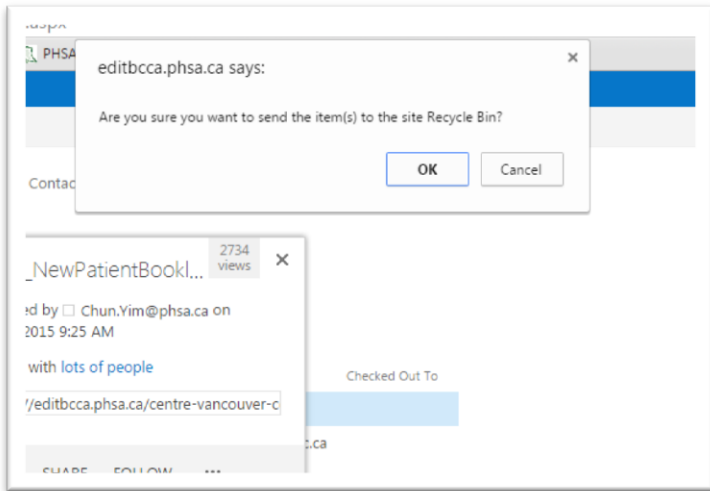
Click the ellipsis to the right of the document file name. The document record will pop up.
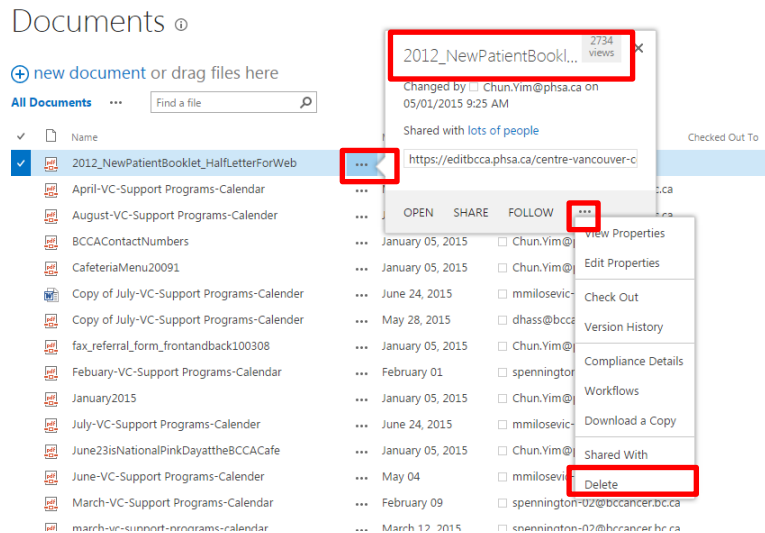
Click the ellipsis in the bottom right of the document record popup. In the drop-down menu that appears, click Delete.

SharePoint will ask you if you are sure. If you are, click OK.

The document will be moved to the Recycle Bin.