

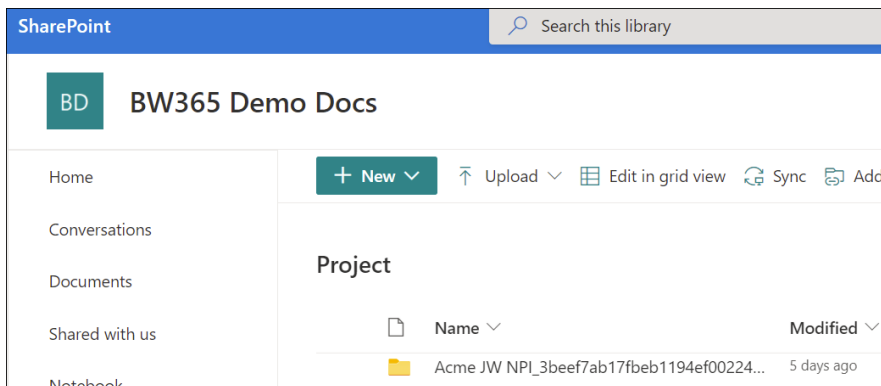
Document Management

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

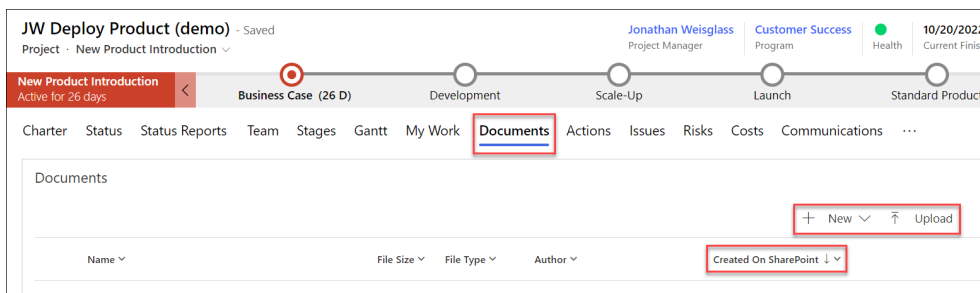
Introduction

Documents in BrightWork 365 are stored in your SharePoint Online site. During the [installation](#) of BrightWork 365 the SharePoint site and accompanying document library were created for the environment. A folder in this document library will get created for every new project. With appropriate permissions you can view all the folders directly in the environment's SharePoint Online site.



Documents Tab

The Documents tab is where you can create new Microsoft Office documents and upload existing documents. These files are stored in your organization's SharePoint document library that is associated with BrightWork 365.



Caution

- By default, files deleted from the Documents tab will be permanently deleted from the

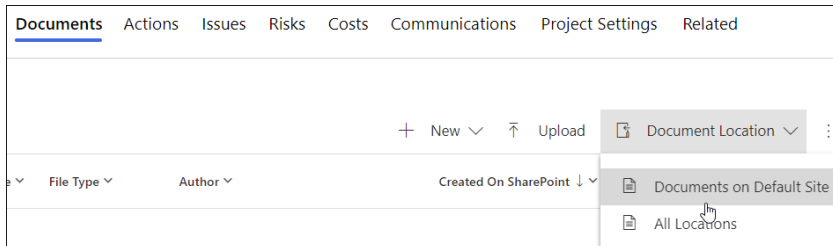
By default, files deleted from the Documents tab will be permanently deleted from the SharePoint site associated with BrightWork 365 and cannot be restored from a recycle bin. Contact your Microsoft Support representative to discuss activating the associated SharePoint Recycle bin to be able to restore deleted documents.

- SharePoint has an indexing limit that is reached when a document library contains more than 5000 items. If you receive a message about the SharePoint throttling limit being exceeded, see this [article](#).

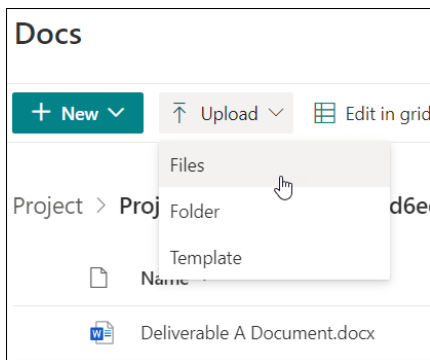
Large Documents

Documents larger than 50 MB will need to be uploaded directly to the associated SharePoint Online site instead of the Documents section of the record. To upload these documents:

1. Go to the record's Documents tab and use the drop-down in **Document Location** to click on **Documents on Default Site**. You will be taken to the associated SharePoint Online location.

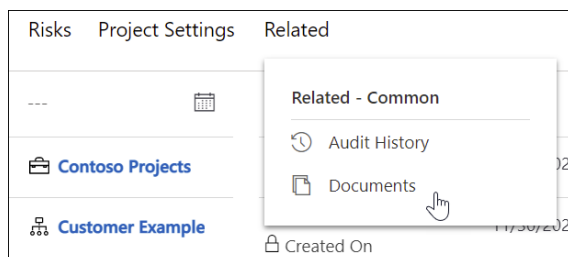


2. Choose Upload to upload the file. The file will upload even if it is larger than 50 MB.



Related Documents

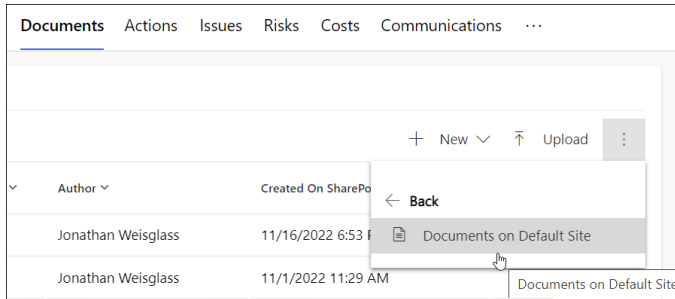
You can also view a record's documents by clicking **Related | Documents** in the menu bar.



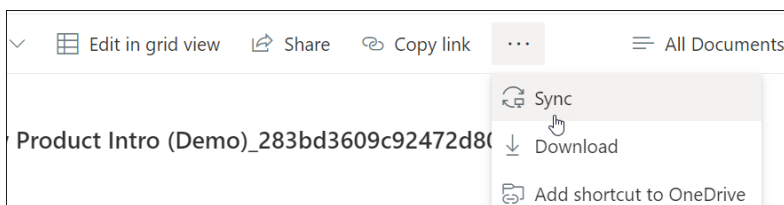
Desktop Sync

An additional method to interact with a BrightWork 365 SharePoint Online document library is via desktop sync:

1. Confirm Microsoft OneDrive is installed on your computer.
2. In the Documents tab click the ellipses, click **Open Location**, and then click **Documents on Default Site**.



3. On the SharePoint Online page that opens click **Sync** to begin the desktop sync via Microsoft OneDrive.



Microsoft Teams Sync

An additional method to interact with a BrightWork 365 SharePoint Online document library is by syncing with a project's channel within a Microsoft Team:

1. Confirm Microsoft OneDrive is installed on your computer.
2. In the relevant project channel click on the **Files** tab and then click **Sync**.

