Document Management

Documents in BrightWork 365 are stored in your organization's BrightWork 365 SharePoint site. During the installation of BrightWork 365 the SharePoint site and accompanying document libraries were created for the environment. Every document enabled table has a document library, and inside each document library is a folder per record that has had the document tab opened. With appropriate permissions you can view all the folders directly in the environment's SharePoint site.
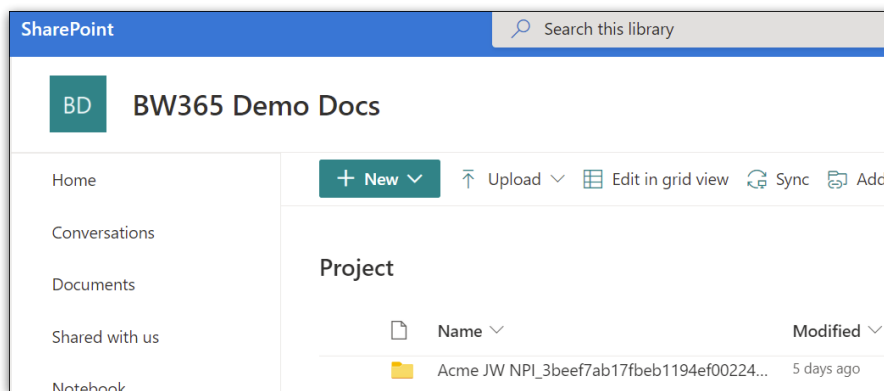
Documents Tab

The Documents tab is where you can view any documents stored in the SharePoint library that is associated with BrightWork 365. Documents can be created within BrightWork 365, uploaded within BrightWork 365, or otherwise saved in the associated SharePoint library.
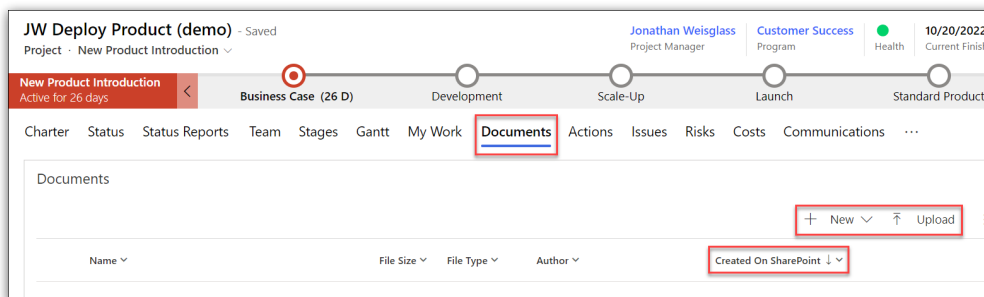

> **Caution**
>
> - By default, files deleted from the Documents tab will be permanently deleted from the SharePoint site associated with BrightWork 365 and cannot be restored from a recycle bin. Contact your Microsoft Support representative to discuss activating the associated SharePoint Recycle bin to be able to restore deleted documents.
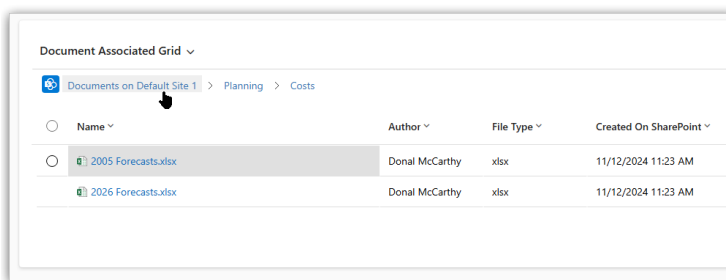> - For customers using custom BrightWork 365 forms: SharePoint has an indexing limit that is

Use Folders

Click **+New | Folder** to create a folder. You can also create folders inside of folders.
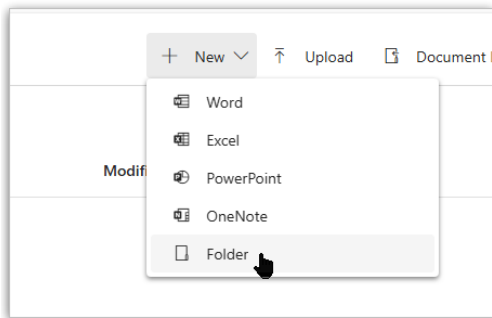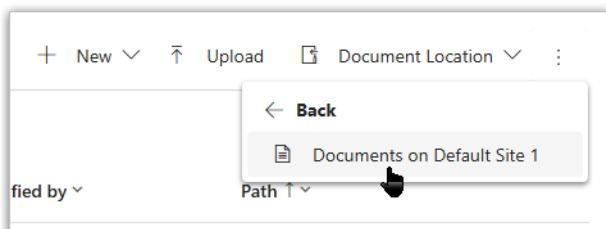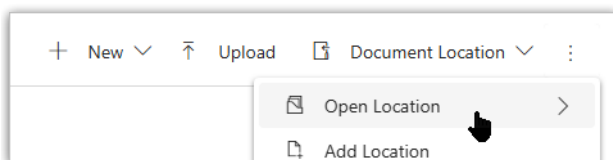

Use the folder breadcrumbs to navigate the folder hierarchy.

Work in SharePoint

You can open the folder associated with the project (or other record) in SharePoint Online and do things like:

- Move documents into folders
- Bulk upload lots of documents
- Sync the folder with your One Drive

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.
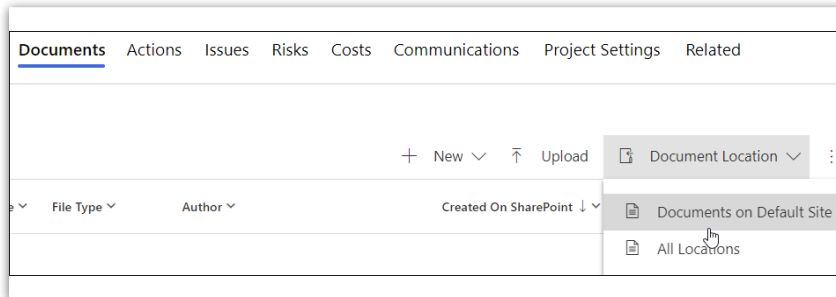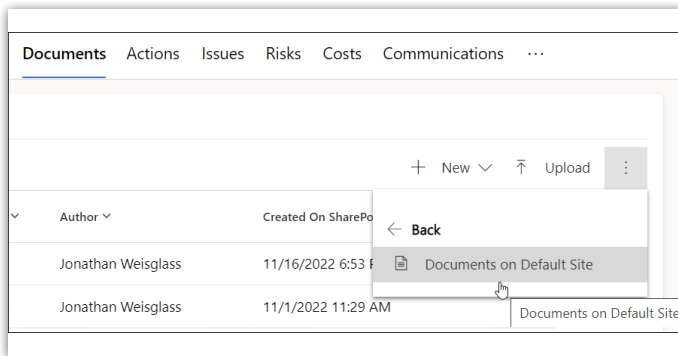

2. Choose Upload to upload the file. The file will upload even if it is larger than 50 MB.
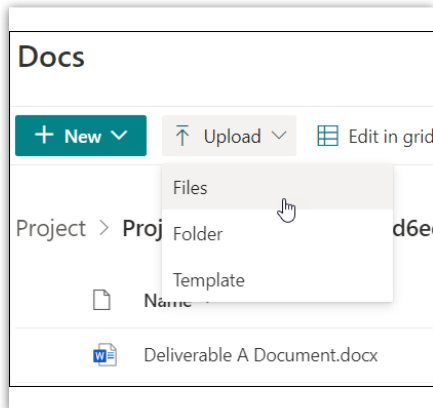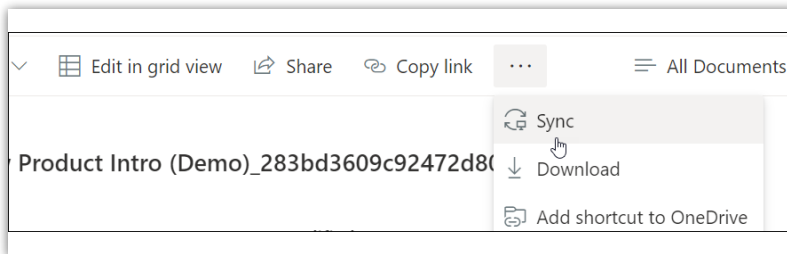

Desktop Sync

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

Document 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**.
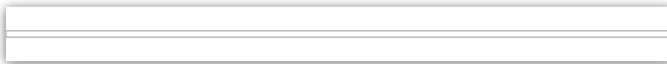
Files Tab Link

Some organizations would like certain projects to exclusively use a Microsoft Teams Channel and its associated SharePoint library, for document management. This can be achieved through a custom configuration of a project template's Documents tab location, and/or with the addition of a custom new form field where a link to the Teams Channel's "Files" location can be entered. Consult with your Customer Success Partner for more information.