



K-Folder Link

for

SharePoint Online



Smart folder access

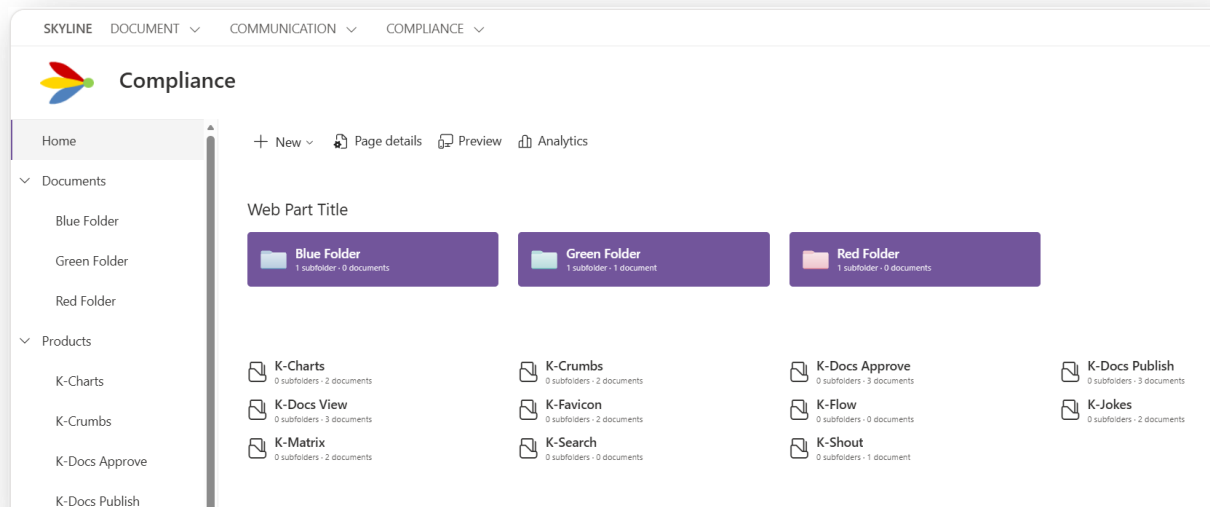
Installation and User Guide

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What is K-Folder Link?



K-Folder Link is a web part for SharePoint Online (SPO) that provides a simple way to view and access folders in a SharePoint document library and optionally keep site navigation synchronised with that folder structure.

It is sort of like the standard SharePoint Quick Links Web Part but with the benefit that it dynamic so you don't need to manually maintain it when the folder structure of the library changes. It also provides these additional benefits:

- Different styles options, namely:
 - Simple Link
 - Outline Button
 - Filled Button
- You can display a simple folder icon or a solid folder graphic, rendered in the colour of the source folder
- Chose to access the folder in the current browser tab or open it in a new one
- You can set a custom sort order and hide any folders that you'd prefer not to show in the UI
- Links can provide summary information about subfolder and document counts
- A hover card can be displayed for each folder link which provides direct access to folders or documents within the folder with a single click
- Site owners can synchronise the folder structure with site navigation and the click of a button

Why we built K-Folder Link

Like all our products, this solution was driven by real-world scenarios and the requirements from engagements with genuine customers. We found that there were many scenarios where the main focus of a site is for document storage and so providing quick access to the underlying folder structure is an easy way to improve productivity.

We often see customers use the standard Quick Links Web Part (QLWP) to provide a convenient folder navigation tool only to then replicate those links in site navigation.

Great as the QLWP is, this method has several drawbacks:

- Each folder link requires manual configuration, and this is time consuming
- The links are static and so web parts (and site navigation links) require ongoing maintenance (which too often never gets done) when the underlying folder structure is updated
- The QLWP is a generic tool for setting up links to any web hosted resource and so it lacks any context which might be leveraged to add additional functionality such as document and subfolder counts or to provide direct access to these items.
- Keeping site navigation synchronized with library folders is torturous as each link must be set manually

We think you deserve better and so we build **K-Folder Link** to address the above shortcomings.

How K-Folder Link Works

K-Folder Link is a web part built using the SharePoint Framework (SPFx). You set web part properties to connect a web part instance to any SharePoint library in the local site. The web part displays a collection of links which can then be used to access the folder and optionally the subfolders and documents in each linked folder.

The solution relies on the SharePoint API only and so there is no requirement for an administrator to approve any additional access to external libraries such as to the Graph API.

By default, the web part will render folders from the top-level root folder in the library, but a folder path can be specified so that any folder can be selected as the root anchor point.

The **K-Folder Link** solution package can be globally deployed so that it is immediately available on all SharePoint sites.

There are a myriad of configuration settings that can be applied to each web part to control style and layout although not all features are available to Freemium customers.

When used to render folder links web parts are read-only, not changes are ever made to the source library and so the solution is completely safe. No data ever leaves your tenancy, and as the solution runs under the identity of current user it fully supports the security and access control settings that may have been applied using the standard SharePoint UI.

The only changes a web part makes to your site is if a site owner chooses to synchronize the folder structure, as configured in a web part instance, to site navigation.

Aim

The aim of this document is to guide you through the processes of installing **K-Folder Link** and how to configure web part instances.

Installing the Solution Package

The solution package can either be installed manually or from the Microsoft App Source.

Uploading and Deploying the Solution Package Manually

The solution package can be downloaded from the K-Folder Link product page on the [Kaboodle Software](https://kaboodle.software/Solutions/K-Connect/K-Connect-FolderLink) web site at:

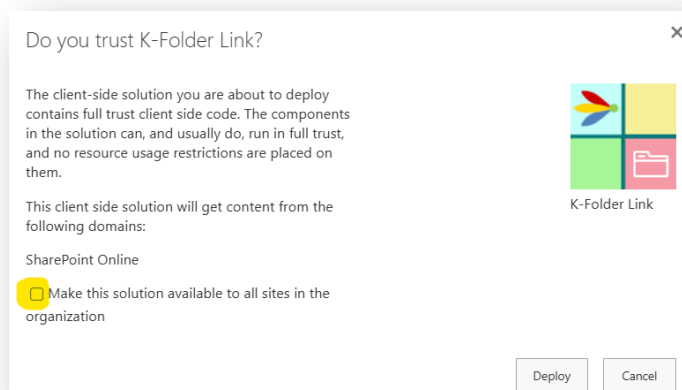
<https://kaboodle.software/Solutions/K-Connect/K-Connect-FolderLink>

Or directly from the Kaboodle CDN at:

<https://kaboodlecustomers.blob.core.windows.net/kconnectfolderlink/k-connect-folderlink.sppkg>

This package can be added to an Application Catalog in the same way as with every SPFx solution, that is by uploading the solution package file to the **Apps for SharePoint** gallery in the Global App Catalog site for the tenancy, or a Site Collection App Catalog, if preferred.

Uploading the solution package will trigger the display of the deploy solution dialog. The screenshot below shows the dialog for the **k-connect-folderlink.sppkg** solution package.



We have configured this solution so that you can optionally skip feature deployment so that it can be deployed globally (when added to the Global App Catalog). This is achieved by checking the checkbox highlighted in the above screenshot.

If it is likely that you will want to use **K-Folder Link** on multiple sites, we recommend skipping feature deployment as this will make the web part immediately available to all sites in the tenancy without the need to install the app in each site separately. If you choose not to globally deploy the solution, the **K-Folder Link** app will need to be explicitly added to every site where it is required, manually by a site owner or designer (see below).

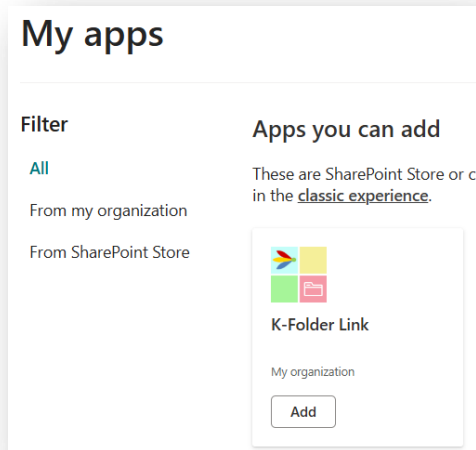
Site Installation

As described above, if the solution package has been added to all sites (skipping feature deployment) from the Global App Catalog, the **K-Folder Link** web part will already be available and so there is no need to install the solution package on any site.

However, if the solution package has not been globally deployed, the app will need to be explicitly added to the site.

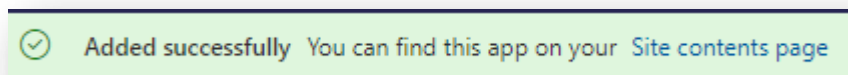
To do this, click on the **App an app** link from the **Site Actions** menu (the cog icon on the top right corner of every page) or from **New > App** menu item from the site homepage or **Site Contents** page.

From the **My apps** page you will see the **K-Folder Link** app card in the **Apps you can add** section of the page as shown below.

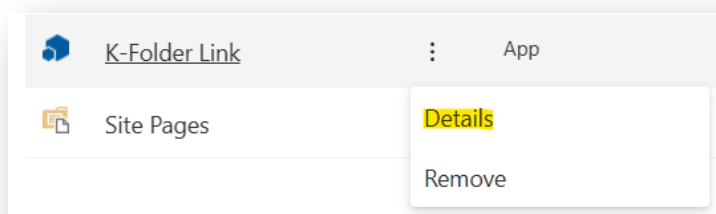


Note that you must be logged in to the site with at least Designer-level permissions to be able to add an app to the site.

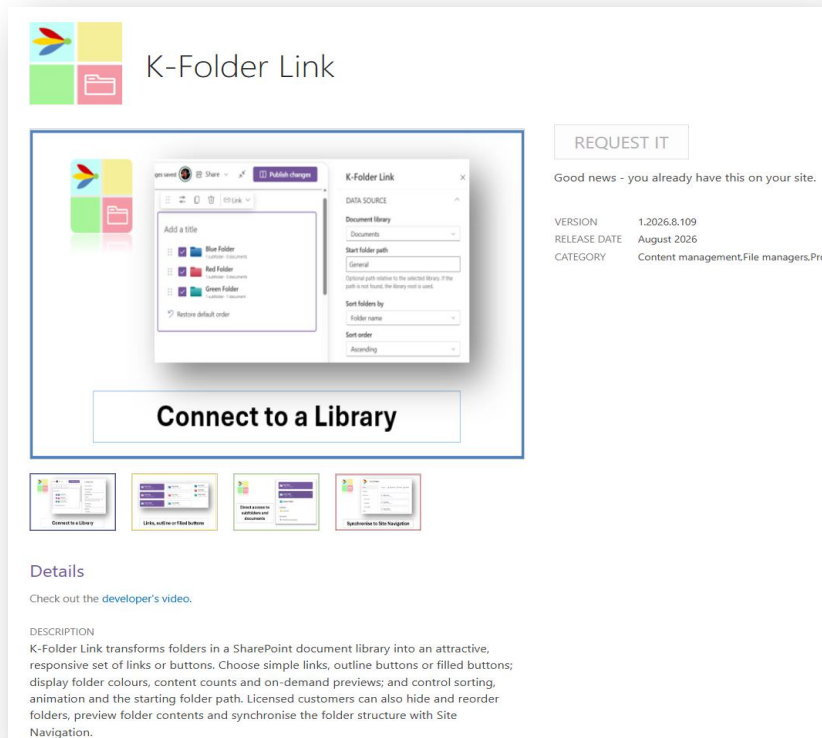
To add **K-Folder Link** app, simply click the **Add** button on the app card. It may take several seconds but the SharePoint UI will report when it has been successfully installed and display a green status message, like that shown below.



If you click on the **Site contents page** link, you will see the app listed.



From the Details link you can access information about the installed solution. The Details page provides some screenshots and a link to a short [3-minute product video](#) hosted on YouTube.

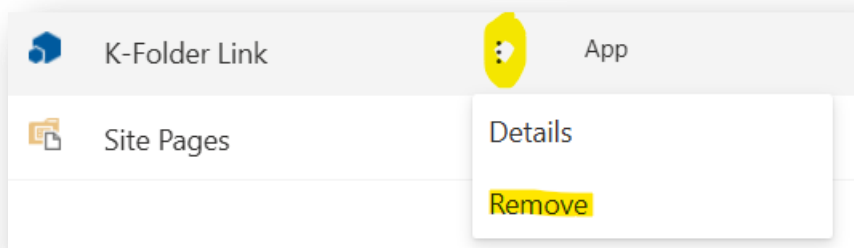


Installing from the Microsoft App Source

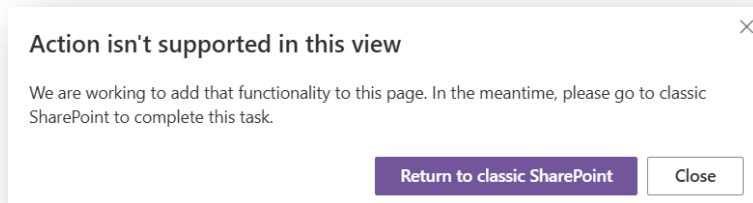
To be provided.

Uninstalling K-Folder Link

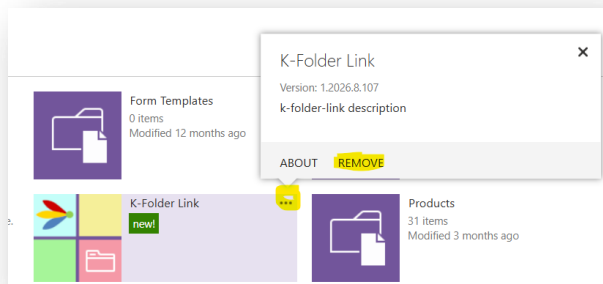
If you no longer require K-Folder Link on a site, you can remove it from the ellipsis menu in Site Settings:



SharePoint will advise you that SPFx solutions can only be removed when in Classic mode and so click the dialog to switch to the legacy UI.



When in classic mode, select the REMOVE link from the hover card

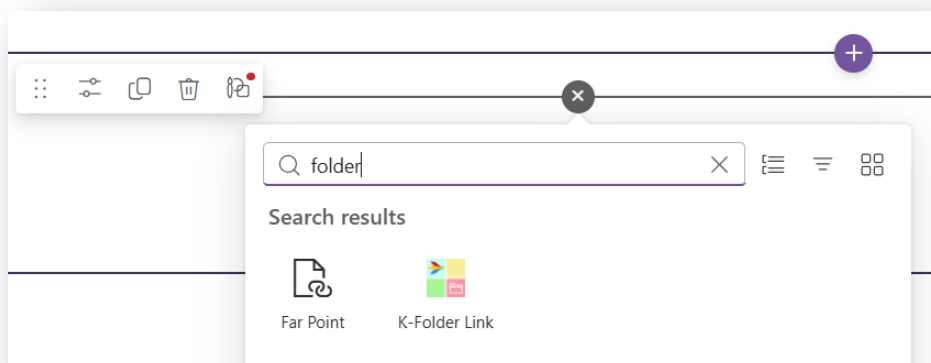


Confirm the action and few moments later the application will be removed from the site.

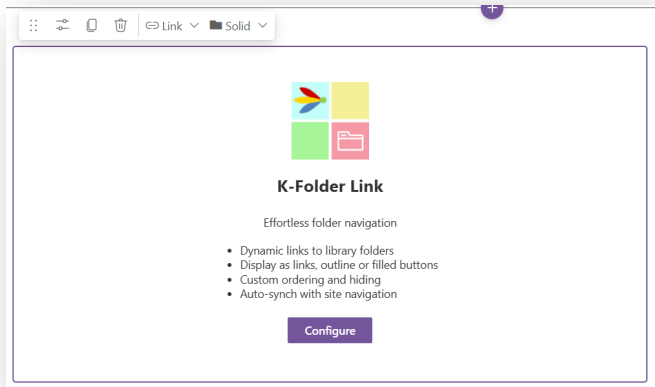
Adding a K-Folder Link Web Part Instance

Once the solution package has been deployed to an App Catalog and the app is available on the site, you can add a **K-Folder Link** web part instance to any SharePoint Modern site page in the same standard way as you would add any other web part to a page.

If you type the word “folder” in the Add web part dialog the **K-Folder Link** web part will be displayed.



Simply click on the icon to add a web part instance to the page.



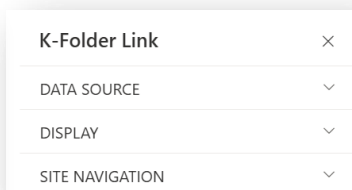
Web Part Configuration

From page edit mode you can access the web part property pane in the usual way as for all web parts or simply click the **Configure** button.

The web part property pane contains 3 pages, as described in the subsections which follow.

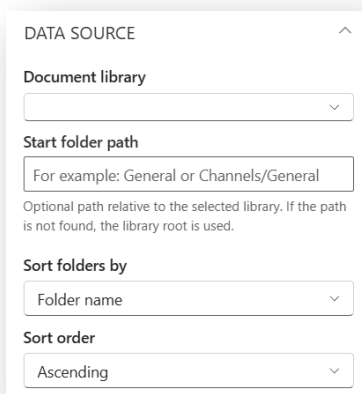
Configuration Settings

The first page provides access to the controls needed to configure the web part. These controls hosted within 3 expandable groups:



Data Source Group

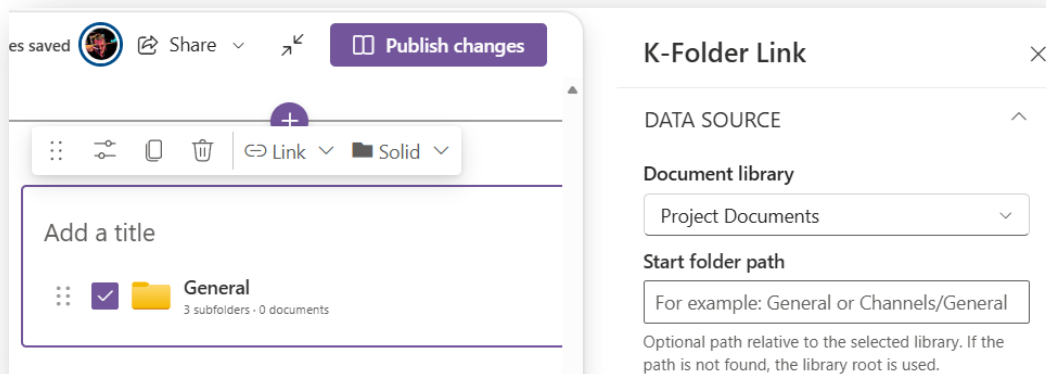
The Data Source Group provide controls which allow you to connect the web part to a library.



Library picker

The control lists all document libraries within the site. Use it to select the source library that contains the folders to be displayed in the web part.

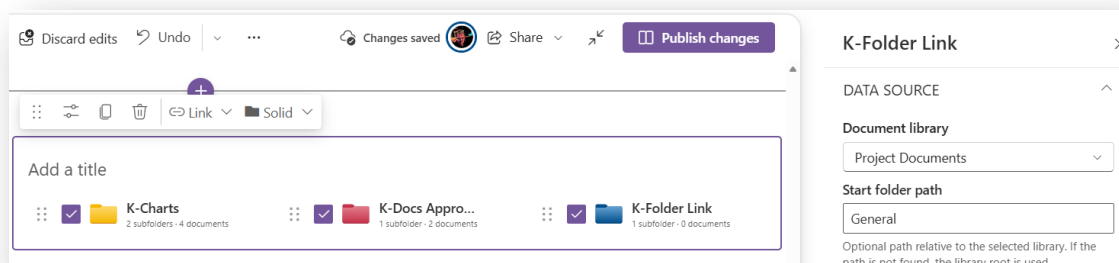
Once a library is selected, the web part will immediately display links to the top level folders.



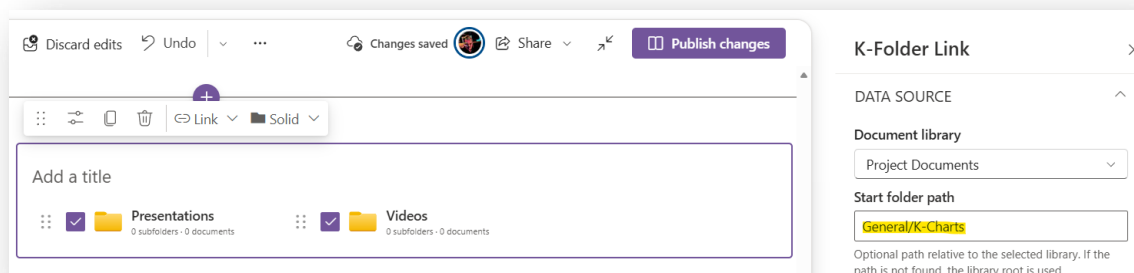
Start folder path textbox

In the above example, the library is connected to the General Teams channel and that might not be the most appropriate anchor point for the web part. You can use the Start Folder Path Textbox to specify a different folder to be used as the web part root folder.

The screenshot below shows the web part configured so that the General folder is now the web part root folder and so the subfolders beneath it are displayed.

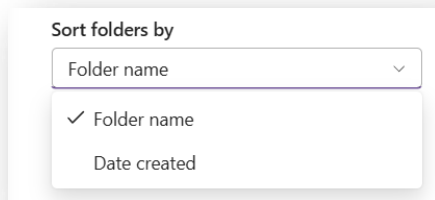


If you need to link to a root folder that is more deeply nested, simply provide the full path using a forward slash to delimit path elements.



Sort folders by picker

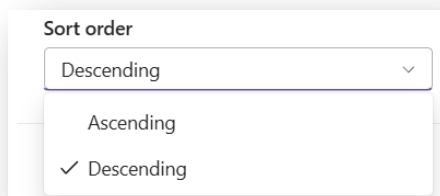
By default, folders will be displayed in ascending alphabetical order, but you can change this so that they are listed by their creation date.

A screenshot of a 'Sort folders by' picker. It features a dropdown menu with 'Folder name' selected. Below the dropdown, there are two options: 'Folder name' with a checkmark and 'Date created'.

This is sometimes preferable if the folder structure is used to store documents based on chronological ordering such as for monthly or quarterly reports and new folders are created as needed.

Sort order picker

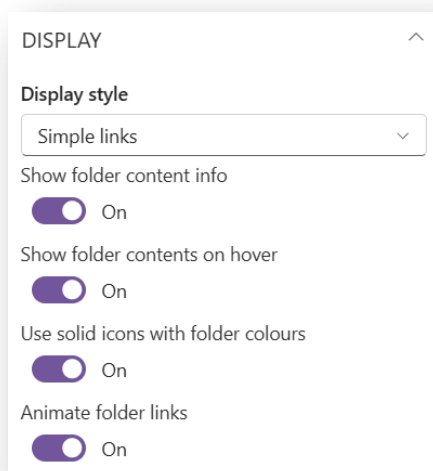
By default, the sort order is ascending but you can use this control to switch the sort order to descending.

A screenshot of a 'Sort order' picker. It features a dropdown menu with 'Descending' selected. Below the dropdown, there are two options: 'Ascending' and 'Descending' with a checkmark.

This may be preferable for folders which are displayed by their creation date so that the newest folder are listed first.

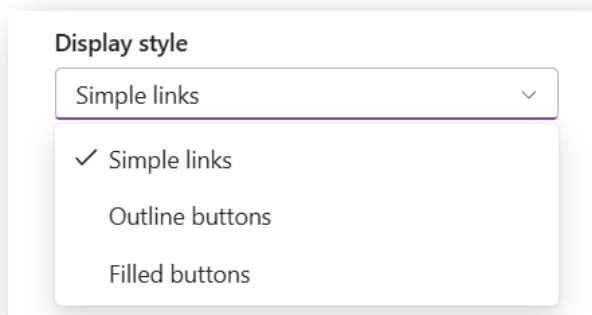
Display Group

The controls in the group are used to set the UI of the web part.

A screenshot of the 'DISPLAY' settings panel. It has a title bar with 'DISPLAY' and an expand/collapse arrow. Below the title bar, there is a 'Display style' section with a dropdown menu set to 'Simple links'. Below this, there are four toggle switches, all of which are turned 'On': 'Show folder content info', 'Show folder contents on hover', 'Use solid icons with folder colours', and 'Animate folder links'.

Display style picker

Use this control to select how the links are displayed.

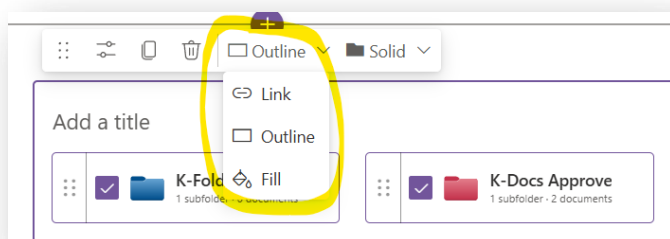


The options are:

- Simple Links
- Outline buttons
- Fill buttons

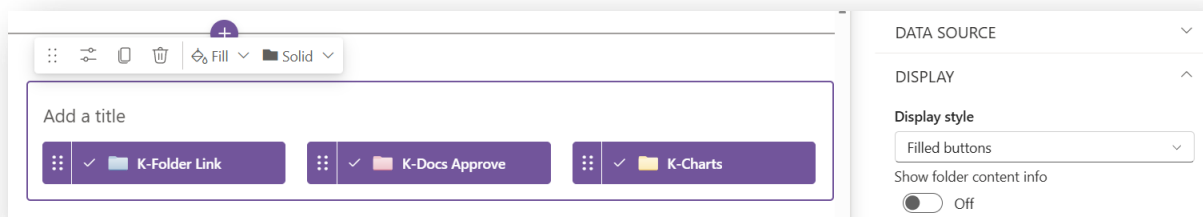
These render links in a way that is similar to the QLWP.

You can also use the web part toolbar to select the display style.



Show folder content info toggle switch

By default, the links/buttons will show count information about the folder contents by displaying the number of subfolders and documents within the folder. Whilst this is generally useful, it can slow rendering on libraries with a large number of folders that are displayed in the UI and so we provide an option to disable this feature. Simply slide the toggle switch to off and the folder content info is not displayed.

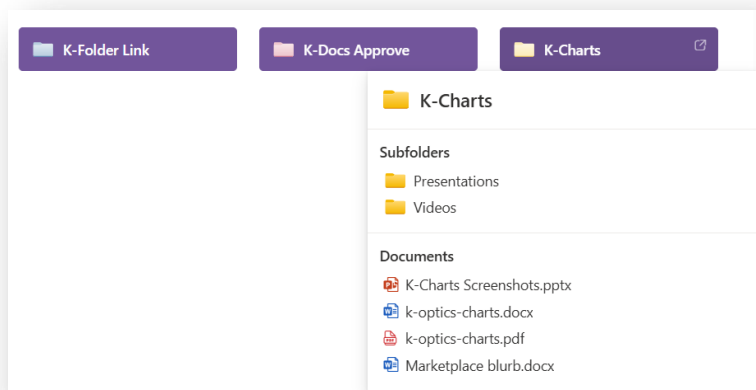


When disabled, the button/link height is reduced, resulting in a more compact UI.

Show folder contents on hover toggle switch

Displaying folder content on link hover is an enhanced feature only available to license paid customers. For Freemium users, this toggle switch is disabled.

When set to on (the default setting) a hover card will be displayed whenever a user hovers over a folder link. This hover card will provide direct access to these subfolder and/or documents.



This hover card is only displayed:

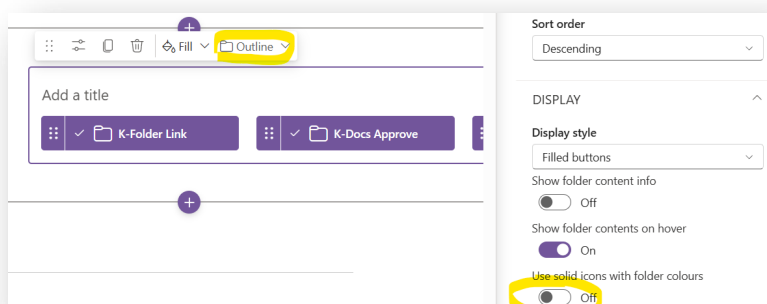
- When the toggle switch is set to on
- For license paid customers
- In normal page view mode
- When the folder contains either subfolders or documents – a hover card is not displayed for empty folders

The hover card is display irrespective of show folder contents setting, described above.

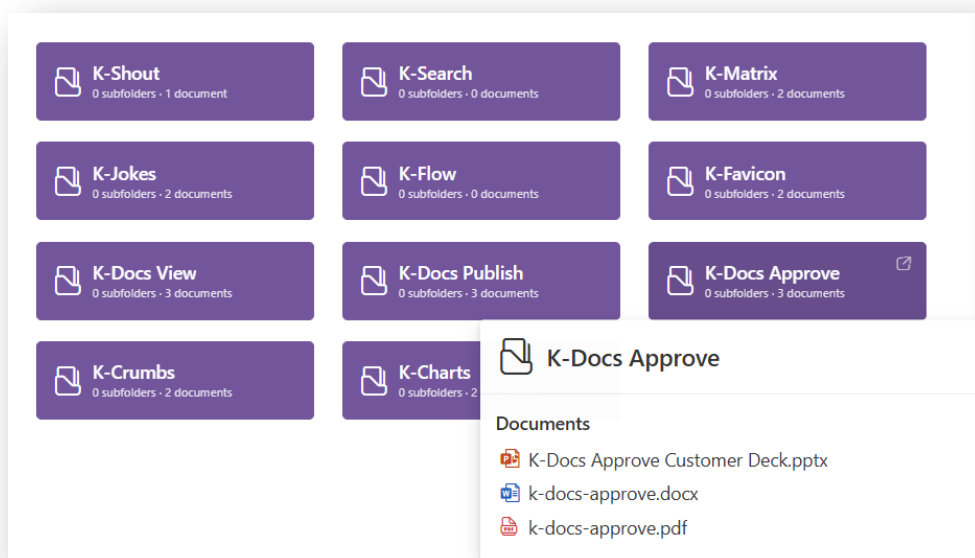
Use solid icons with folder colours toggle switch

This is set to be enabled (on) by default and will display the folders with a solid graphic that is consistent with the folder colours applied at the source library.

This setting can also be set from the web part toolbar and when set to Off/Outline a generic folder icon is displayed, in place of the soldi folder graphic.



When the web part links to Document Sets, rather than standard folders, a Doc Set icon is displayed.



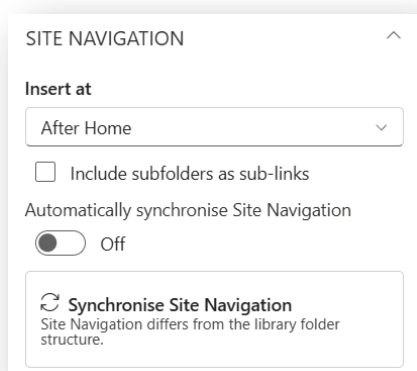
For document sets, the Doc Site icon is used regardless of the toggle setting as document sets do not support colouring.

Animate folder links toggle switch

When enabled (the default setting) the web part will render the links on page access with a subtle animation effect, similar to that used natively by other SharePoint web parts such as the QLWP.

Site Navigation Group

This group provides controls which allow site owners to optionally synchronise the web part folder links with the site navigation menu system.

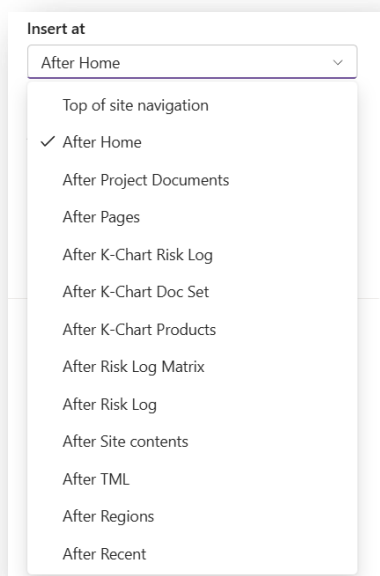


Note that this is an enhanced feature which is not available to Freemium customers. The controls in this section will only be enabled:

- If the customer has a valid trial or paid license
- If the current user has full control of the site usually as an owner or site collection administrator

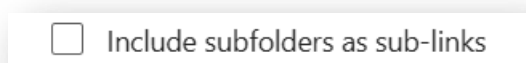
Insert at picker

This picker will list the current top-level navigation elements in the site navigation and allows you to select the position where the folder navigation will be added.



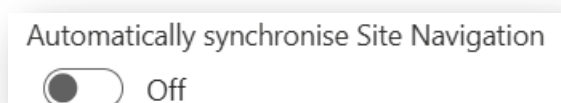
The default position is directly after the home page link, but this can be changed using this picker. You can later relocate the menu navigation item using the standard SharePoint UI as required.

Include subfolders as sub-links checkbox



When checked, any subfolders will be set up as sub-links in the navigation. This is disabled by default.

Automatically synchronise Site Navigation



When enabled, the web part will automatically synchronise the site navigation to the web part folder structure whenever the page is loaded by a user who has full control of the site.

If this setting is enabled, a check is first made to see if the user has the permissions required to update the site navigation and if they do, a second check is made to see if the site navigation reflects the current folder structure as rendered by the web part. If the web part and the site navigation are not synchronised, the site navigation is updated.

This is useful if you want the system to ensure that the site navigation and web part are synchronised automatically and so further reducing the need for ongoing maintenance.

However, be warned that if you add multiple web part instances to the same page, that link to the same library, you may end up with duplicate links. So care and experimentation is advised when enabling this feature.

Synchronise Site Navigation Button

 **Synchronise Site Navigation**
Site Navigation differs from the library folder structure.

Click this button to manually synchronise the site navigation with the web part folder structure.

Once processing is complete, the button will be disabled but report that the site navigation is already synchronised.

Insert at

After Home ▼

☐ Include subfolders as sub-links

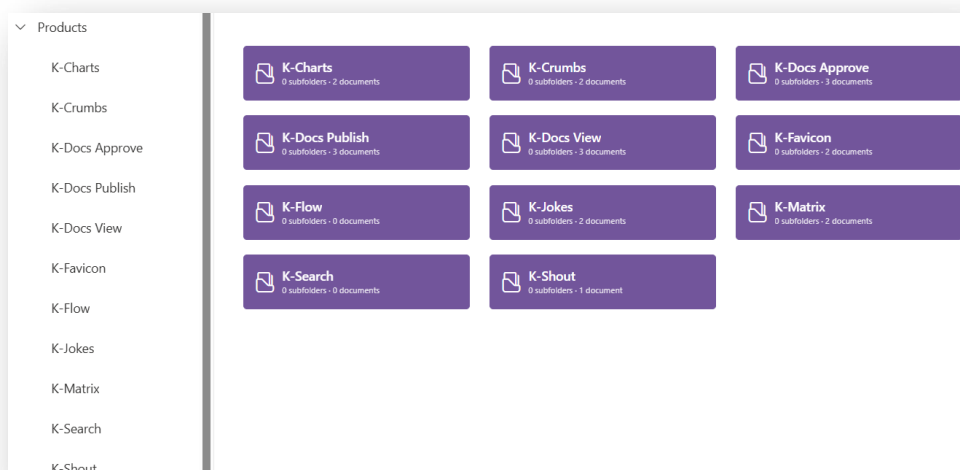
Automatically synchronise Site Navigation

☐ Off

 **Synchronise Site Navigation**
Site Navigation is already up to date.

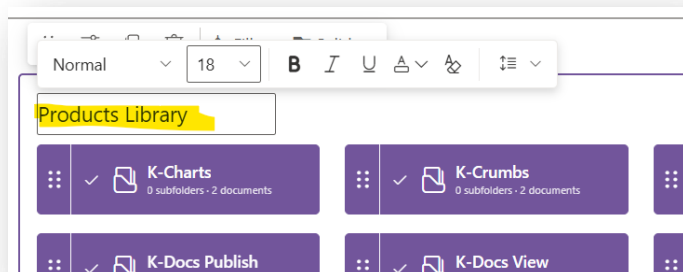
The button is only enabled if a synchronisation is required.

After site navigation synchronisation and page republishing, you may need to refresh the page to view the site navigation

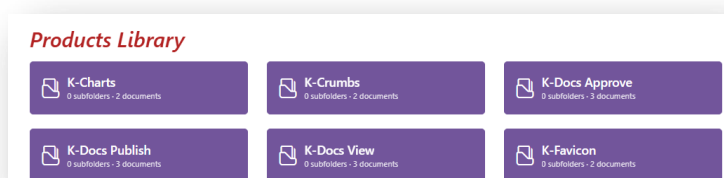


Web Part Title Settings

Like many of the standard SharePoint web parts, you can add a web part title. In page edit mode, click into the web part title textbox to add the title text.



You can then use the integrated title toolbar to apply any custom style settings that should be applied to the web part title text.

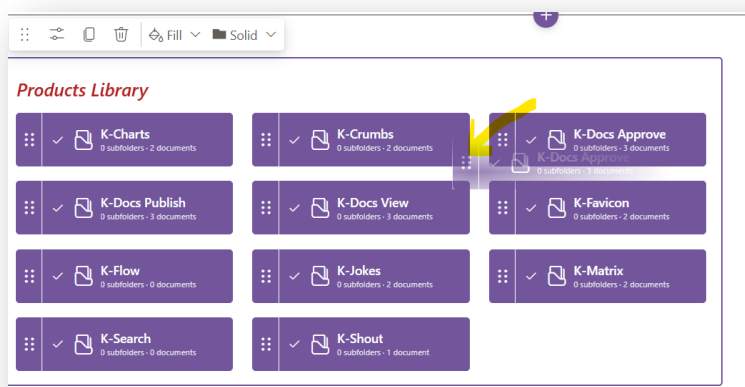


Custom Ordering and Hiding Folder Links

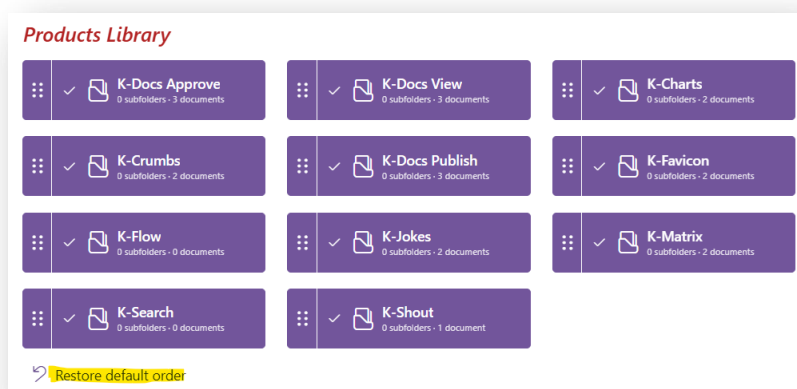
In many scenarios the default sort order for links (whether by folder name or creation date) will be perfectly fine and generally you will likely want to display all folders beneath the root folder.

However there may be specific scenarios in which you want a custom folder order or to hide specific folder links from the web part.

To achieve this, switch to page edit mode and use the link handle to drag and drop the folder link into a desired location in a way that is similar to how the standard QLWP works



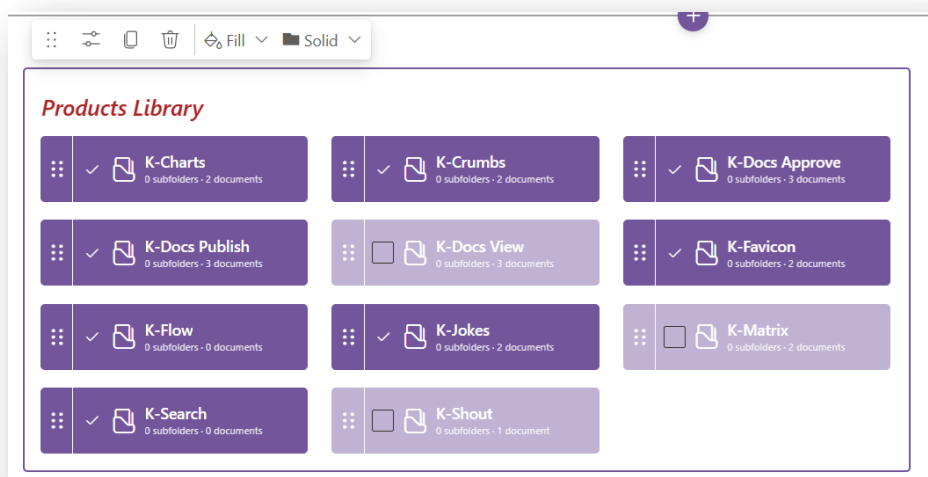
When the links differ from the default sort order a **Restore default order** button is displayed.



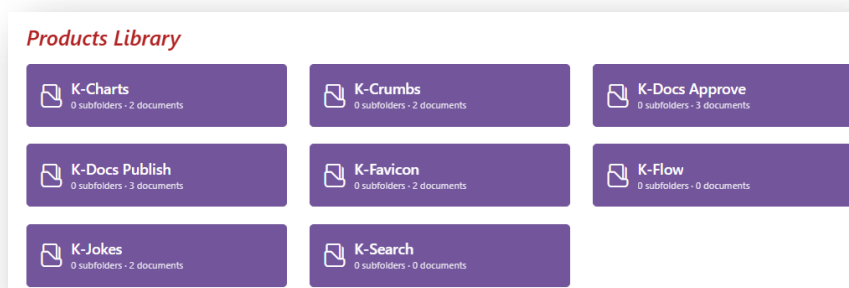
When clicked, the default sort order will be applied to the links and the restore button is hidden.

In page edit mode, there is a checkbox displayed with each link. By default, the links will be selected and so the folder link will be displayed in normal page view mode.

However, when you uncheck a link, it will greyed out in page edit mode.



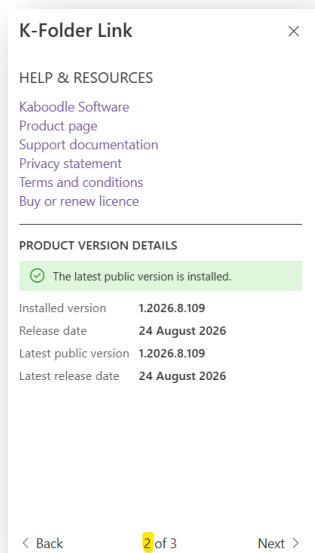
In normal page view mode, any unchecked links are not rendered.



Note that site navigation synchronisation is based on what the web part renders and so will apply and custom sort order and exclude hidden folder links.

Help and Resources

The second page of the web part configuration pane shows Help & Resources controls.

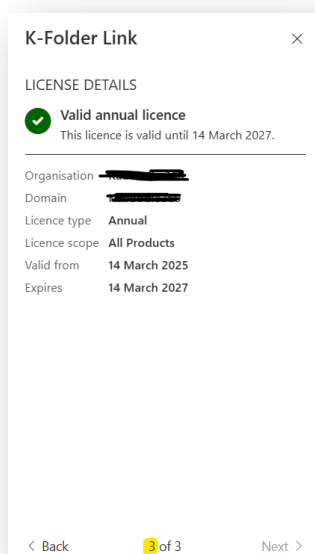


These controls provide ready access to relevant on-line resource such as the Kaboodle Product page as well as information about the installed product version and release date.

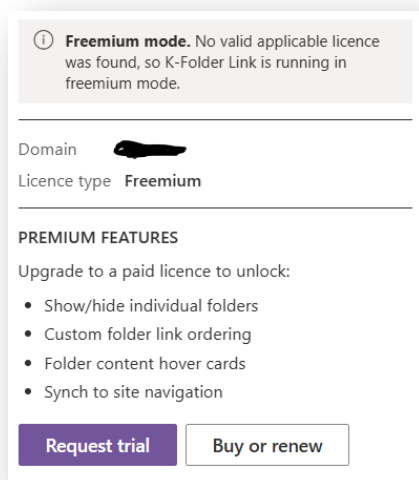
If there is a public release for the **K-Folder Link**, that is newer than the installed version, the UI will provide a download link to the latest release.

License Details

The 3rd page in the web part property pane contains licensing information.



For Freemium customers, those using **K-Folder Link** without a valid trial or paid license, the UI is different.



It lists the premium features which can be unlocked with a paid license and provides links to request a trial license or to purchase or renew paid license.

If a trial or paid license expires **K-Folder Link** will revert to operation in Freemium mode.

Limitations with Freemium Product

K-Folder Link is a function and useful web part solution even as a Freemium product, but the following enhanced features are only available to license paid customers:

- The ability to show or hide specific folder links
- The option to apply custom link ordering
- Folder content hover cards
- Site navigation synchronisation

Licensing

To register for a free 30-day trial license please visit our trial registration page at:

<https://kaboodle.software/Trial>

Note that trial licenses are not tied to any specific Kaboodle product but rather they unlock the enhanced features of all products for the duration of the trial. If you need to extend a trial period, please contact us using the online contact page at <https://kaboodle.software/Contact>

Should you wish to purchase a license please visit our purchasing page at

<https://kaboodle.software/Buy>

From here you are able to self-generate a quote in USD, GBP, AUD, NZD and EUR. All license costs are based on the number of licensed users you have in your tenancy and there are discounts to have for NFP organisations and if you chose a product group license rather than licensing products individually.