

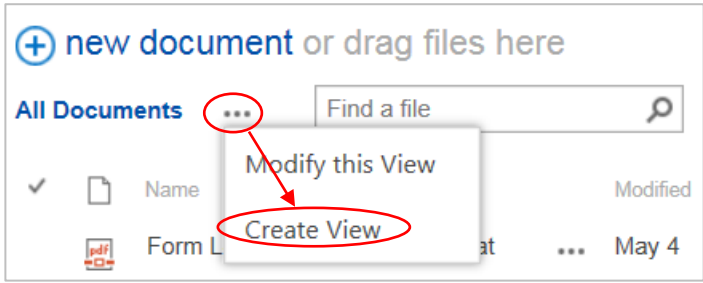
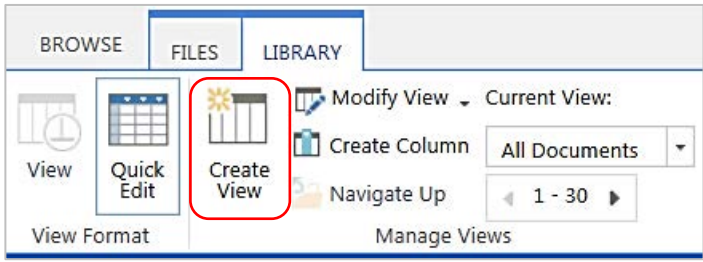
# Views – Your Content At A Glance

Shape your team’s content with SharePoint views

## Part 2: Create and Modify Views

### Getting Started







1. Go to a master library or list – not just a dashboard page or web part  
**NOTE:** Web parts on pages can have custom views
2. In the View selector, click the **ellipsis**, then choose **Create View**

<p>In the View selector, click the <b>ellipsis</b>, then choose <b>Create View</b></p>	
<p>Alternatively, on the <b>Library</b> ribbon tab, in the Manage Views group, click <b>Create View</b></p>	

### View Types

3. Next, choose a **view type** (view format) *OR* start from an **existing view** (i.e., a copy)  
**TIP:** The most common option is **Standard View**

CHOOSE A VIEW TYPE

 <p><b>Standard View</b> View data on a Web page. You can choose from a list of display styles.</p>	 <p><b>Datasheet View</b> View data in an editable spreadsheet format that is convenient for bulk editing and quick customization.</p>
 <p><b>Calendar View</b> View data as a daily, weekly, or monthly calendar.</p>	 <p><b>Gantt View</b> View list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time.</p>
 <p><b>Access View</b> Start Microsoft Access to create forms and reports that are based on this list.</p>	 <p><b>Custom View in SharePoint Designer</b> Start SharePoint Designer to create a new view for this list with capabilities such as conditional formatting.</p>

START FROM AN EXISTING VIEW

- ▣ All Documents

## View Configuration Options

- Next, you will **configure** the view – available options and requirements vary depending on the view type
- After you configure the view, click **OK** – located at both the top and bottom of the page

Here are some **tips to consider** while configuring your views:

### Name

- Keep It Simple:** Choose a name that is sufficiently self-explanatory to users, yet short
- Characters:** Spaces are OK, but avoid special characters  
**TIP:** After the view has been created, you can modify its URL; for example, remove spaces
- Alphabetical Sort:** Views are listed alphabetically – default view first, then private views alphabetically, then public views alphabetically

### Audience

- Public Views:** Available to everyone, but can only be created by Owners  
**NOTE:** The default view must be a public view
- Private Views:** Only available to the user who created it, but can be created by Contributors and Owners

### Columns


- Check / Uncheck:** Show or hide columns for most relevant information
- Position Form Left:** Organize columns left to right in meaningful, productive order
- Available Columns:** Based on the associated Content Types (Owners can create columns and edit Content Types)  
**TIP:** Explore the columns; for example, Name vs. Name (linked to file with edit menu)


### Sort

- Sort By Column:** Select up to two columns to determine the order of documents and items
- None:** Default sort order is alphabetical by name
- Common Sorts:** Name, Modified, Created
- Ascending:** A, B, C, or 1, 2, 3, or Most Recent to Oldest (or reverse the order by **Descending** sort)

**First sort by the column:**


Modified ▼


 Show items in ascending order  
(A, B, C, or 1, 2, 3)

 Show items in descending order  
(C, B, A, or 3, 2, 1)

**Then sort by the column:**

None ▼

 Show items in ascending order  
(A, B, C, or 1, 2, 3)

 Show items in descending order  
(C, B, A, or 3, 2, 1)



Sort only by specified criteria (folders may not appear before items).

## Filter

- **Filter By Column:** Display a subset of documents or items by using one or more filters
  - **Current Date [Today]:** Dynamic filter that requires Date and Time column + [Today]; for example,
    - Created is equal to [Today]
    - Modified is equal to [Today]
    - Modified is greater than or equal to [Today]-7
    - Due Date is less than or equal to [Today]+7 AND Due Date is greater than or equal to [Today]
  - **Current User [Me]:** Dynamic filter that requires People or Group column + [Me]; for example,
    - Assigned To is equal to [Me]
    - Modified By is not equal to [Me]
    - Checked Out To is equal to [Me]
    - Checked Out To is equal to [Me] AND Assigned To is not equal to [Me]
  - **Exact Spelling & Capitalization:** All filter values must be spelled and capitalized exactly as labeled in columns
  - **Operators:** Options include is equal to, is not equal to, is greater than, begins with, contains, etc.
  - **Boolean AND/OR:** AND = both criteria are true; OR = either criterion is true
- NOTE:** For complex filters of three or more rules, test the results because results may be counterintuitive

**FILTER**

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

 Show all items in this view  
  Show items only when the following is true:

Show the items when column

Assigned To

is equal to

And  Or

When column

Modified

is greater than or equal to

And  Or

When column

Assigned To

is equal to

[Show More Columns...](#)

Example: Show recently modified items assigned to the current user, and show unassigned items

### Tabular View


- **Checkboxes:** Allow users to select (check) documents or list items  
**NOTE:** This option is enabled by default


### Group By

- **Replace Folders:** Groups are more dynamic, versatile, and fast-responding than traditional folders
- **Group By Column:** Select up to two columns to group and subgroup documents and items
- **Expand / Collapse:** Users can click a triangle to expand or collapse group topics

**First group by the column:**


Assigned To ▼


 Show groups in ascending order  
(A, B, C, or 1, 2, 3)

 Show groups in descending order  
(C, B, A, or 3, 2, 1)

**Then group by the column:**

None ▼

 Show groups in ascending order  
(A, B, C, or 1, 2, 3)

 Show groups in descending order  
(C, B, A, or 3, 2, 1)

By default, show groupings:

Collapsed  Expanded

**Number of groups to display per page:**

### Totals

- **Count:** For example, display total count of results
- **More Options:** Depending on the column type, options include Sum, Max, Min, and Average

### Style

- **Default:** Stick with the classic style, or experiment with other styles

### Folders

- **Go Folderless:** You don't need library folders – instead use metadata tags and views with groups and/or filters
- **View Options:** If you do use folders in document libraries, there are options for viewing content

### Item List

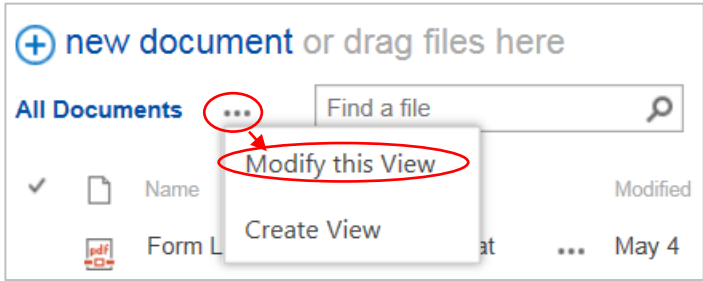
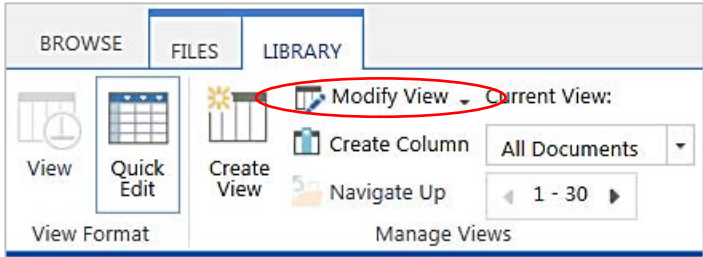
- **Per Page:** Choose “Display items in batches of the specified size” to limit how many documents or items display per page (30 items by default) – and users can click next / previous arrows to page through more results

### Mobile

- **Already Set Up:** SharePoint views are enabled OOTB to adapt to various displays sizes, such as a smart phone

## Modify Views

Before you can modify a view, you must be looking at that view!

<p>In the View selector, click the <b>ellipsis</b>, then choose <b>Modify this View</b></p>	
<p>Alternatively, on the <b>Library</b> ribbon tab, in the Manage Views group, click <b>Modify View</b></p>	

## Options

- Rename the view
- Change the URL; for example, remove spaces
- Delete the view
- Change the view options such as displayed columns, sort orders, filters, groupings, etc.

**NOTE:** You cannot convert private views to public views, or vice versa. However, you can create a new view that is based on an existing view. Also note, only public views can be the default view.

DELETE
OK
CANCEL

View Name:

Web address of this view:


http://train.net. [redacted] /Shared Documents/Forms/ .aspx


**Make this the default view**  
(Applies to public views only)


## Datasheet View (Quick Edit View)


View data in an editable spreadsheet format that is convenient for bulk editing. View options include: Name, Audience, Columns, Sort, Filter, Totals, Folders, Item Limit (but not Group).

CHOOSE A VIEW TYPE

 **Standard View**  
View data on a Web page. You can choose from a list of display styles.

 **Calendar View**  
View data as a daily, weekly, or monthly calendar.

 **Datasheet View**  
View data in an editable spreadsheet format that is convenient for bulk editing and quick customization.

 **Gantt View**  
View list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time.

## Calendar View

View data as daily, weekly, or monthly calendar. Be sure to configure Time Interval, Calendar Columns, and Default Scope. Also available, Filters.

**TIME INTERVAL**

Specify the columns used to place items in the calendar.

**Begin:**

**End:**

**CALENDAR COLUMNS**

Specify columns to be represented in the Calendar Views. The Title fields are required fields. The Sub Heading fields are optional fields.

**Month View Title:**

**Week View Title:**

**Week View Sub Heading:**

**Day View Title:**

**Day View Sub Heading:**

**DEFAULT SCOPE**

Choose the default scope for the view.

Default scope:

Day

Week

Month

You can change this at any time while using the calendar.