

Views – Your Content At A Glance

Discover the inherent power of SharePoint views

Part 1: Exploring SharePoint Views

Did you know, a view is a saved query? Views allow you and your team to display content in a variety of relevant ways.

- Choose helpful names for each view (**TIP:** Views are listed alphabetically)
- Organize columns left to right in meaningful, productive order
- Show or hide columns for most relevant information
- Each view has its own URL, and hyperlinks take you directly to a specific view
- Multiple coworkers can look at the same page, same data, but with different views at the same time

Here are some ideas for document libraries.

The screenshot shows the SharePoint interface for a document library named 'trainingnet'. The top navigation bar includes 'FILES' and 'LIBRARY' tabs. Below the navigation bar is a ribbon with various view management options. The main content area displays a list of documents under the 'All Documents' view. A context menu is open over the 'All Documents' view name, showing options like 'Hold Until', 'My Documents', 'Old Archives', 'Quick Edit', 'SW Comments', 'Modify this View', and 'Create View'.

Default View

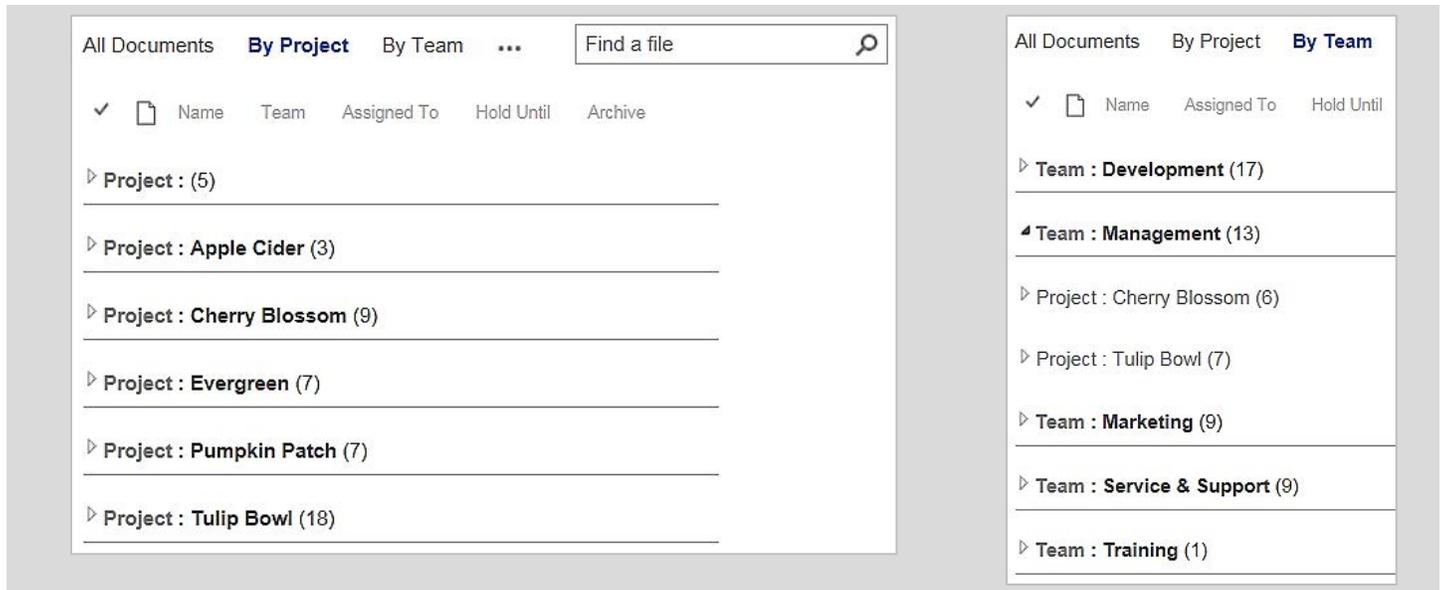
- Every list and library has a default view – every time users go to the library or list, the default view displays
- For example, All Documents is the out-of-the-box default view for document libraries
- **TIP:** For a default view, choose what is most relevant for most users (Owners can change the default view)

Public and Private Views

- Public views are available to everyone, but can only be created by Owners
NOTE: The default view must be a public view
- A private view is only available to the user who created it, but can be created by Contributors and Owners

Group

- Group documents or items by categories such as Product, Assigned To, or Status
- Folder directories are static, but views with groups are dynamic and versatile
- **TIP:** Click a triangle to expand / collapse a group
- **TIP:** Use the sub-groups to categorize by a second property; e.g., by Products, then by Status



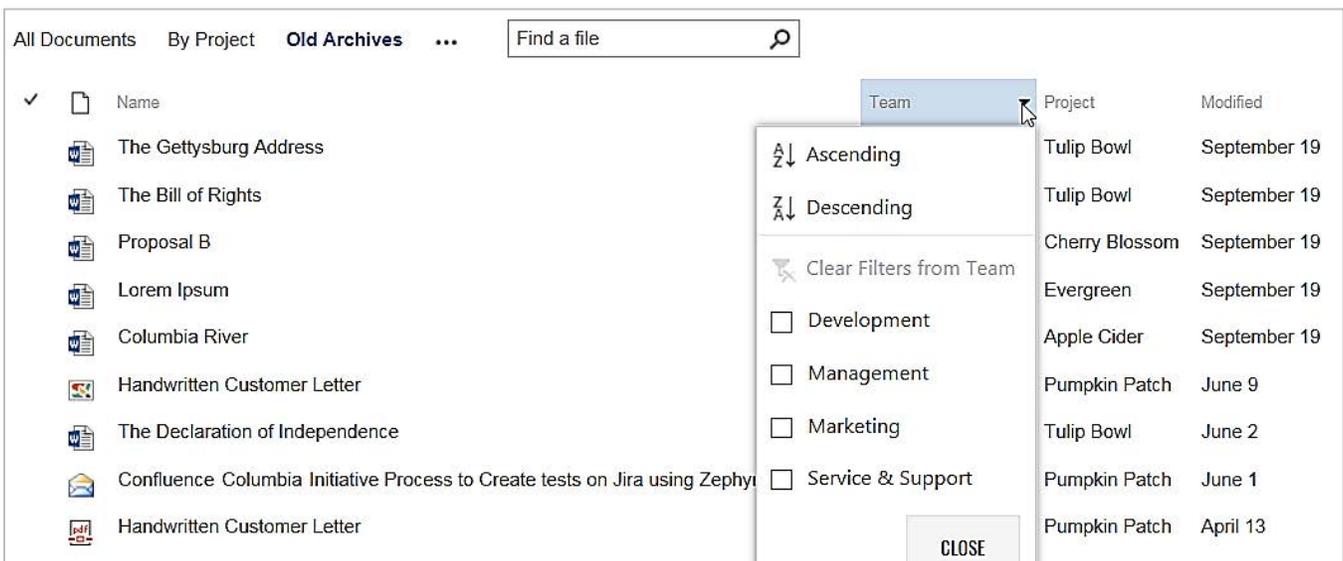
Examples: Group by Project (*left*); Group by Team, then by Project (*right*)

Sort

- Each view has a built in sort-order, with an optional sub-sort-order
- **TIP:** Use column headers to sort ascending (A to Z) or descending (Z to A)

Filter

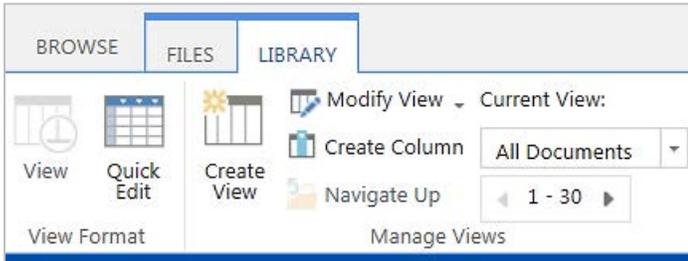
- Trim down the list – show only documents or items that meet the criteria
- **TIP:** Use column headers to filter, show fewer options



Example: Filter by Old Archives, sort by Modified, can further filter and sort by column header Team

Quick Edit

- Quick Edit is a convenient way to edit properties for several documents or items at once
- Aka “Datasheet” view format, which can be a saved view
- Access via the Library ribbon tab, then click Quick Edit
- To exit Quick Edit mode and confirm changes, on the ribbon click View *OR* in the Summary area click Stop
- **TIP:** Show or hide columns in a view for the purpose of bulk editing properties via Quick Edit



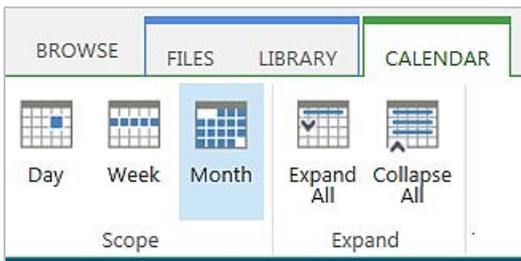
Stop editing this list

All Documents By Project By Team ... Find a file

✓	📄	Name	Project	Team	Notes	Hold Until	Archive	+
	📄	ABC Contract	...	Evergreen	Development	New business 2017; Construction	5/25/2017	No
	📄	ABC Proposal v1	...	Evergreen	Development	Construction	5/25/2017	No

Calendar Format

- Draw attention to date fields such as Effective Date, Due Date, Received by Date, Hold Until Date, etc.
- **TIP:** There's a fourth tab in the ribbon
- **TIP:** Use the main link in the Quick launch (left navigation) or top link bar to reset to the default view



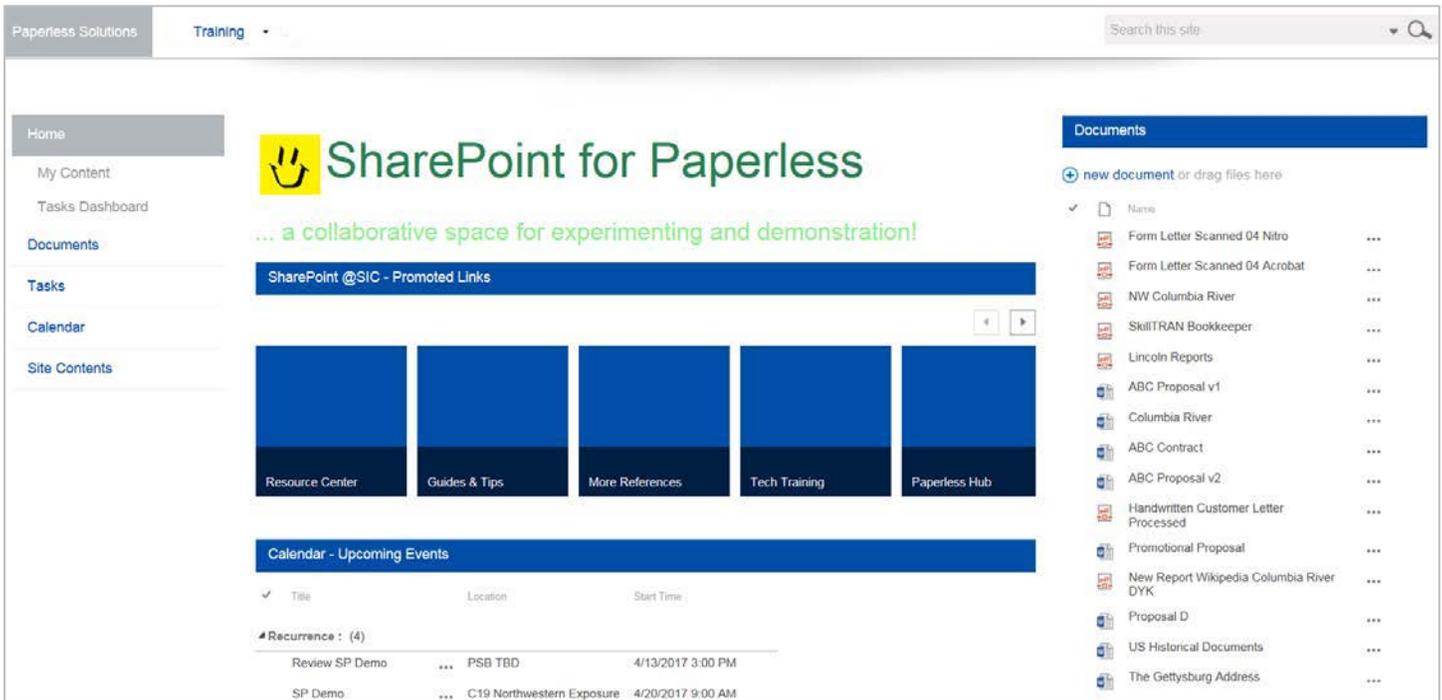
May 2017

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
30	1	2	3	4	5	6
7	8	9	10	11	12 12:00 am - 12:00 am Handwritten Customer Letter	13
14	15 12:00 am - 12:00 am SkatTRAN Bookkeeper.pdf	16	17	18	19 12:00 am - 12:00 am Proposal Share.pdf	20
21	22	23	24	25 ABC Contract.docx ABC Proposal v1.docx ABC Proposal v2.docx	26 US Historical Documents.pdf Columbia River.pdf	27
28	29 12:00 am - 12:00 am NW Columbia River.pdf	30 12:00 am - 12:00 am Lorem Ipsum.pdf	31	1	2	3

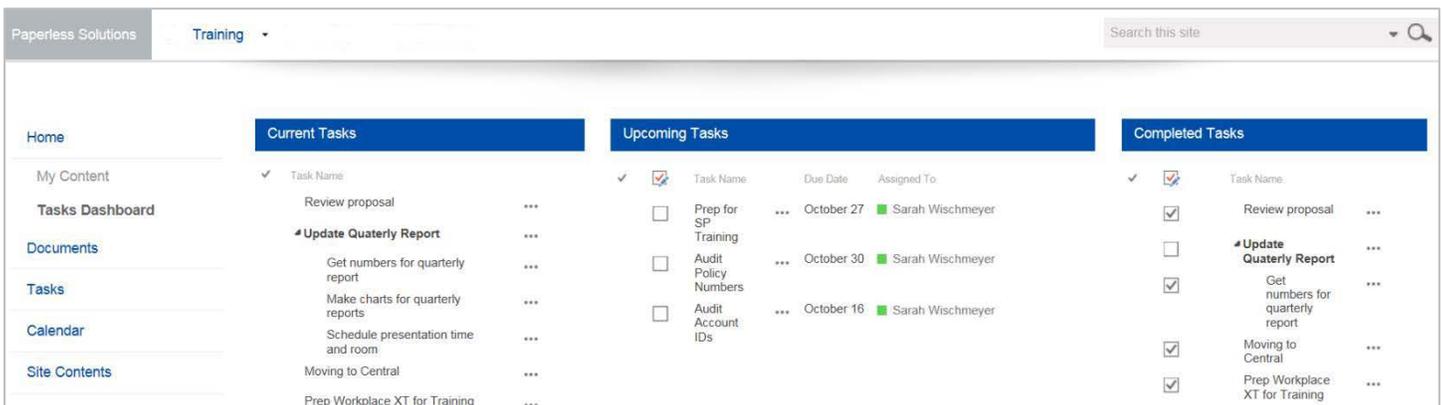
25	26
ABC Contract.docx	US
ABC Proposal v1.docx	Col
ABC Proposal v2.docx	

Web Parts

- Another place views exist is on webpages as web parts
- **TIP:** Use dashboard pages and web parts to simultaneously see multiple views, even multiple lists and libraries



Example: The homepage melds Shared Documents, Team Calendar, and Promoted Links in one place



Example: The Task Dashboard shows what's on deck, upcoming, and completed