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.

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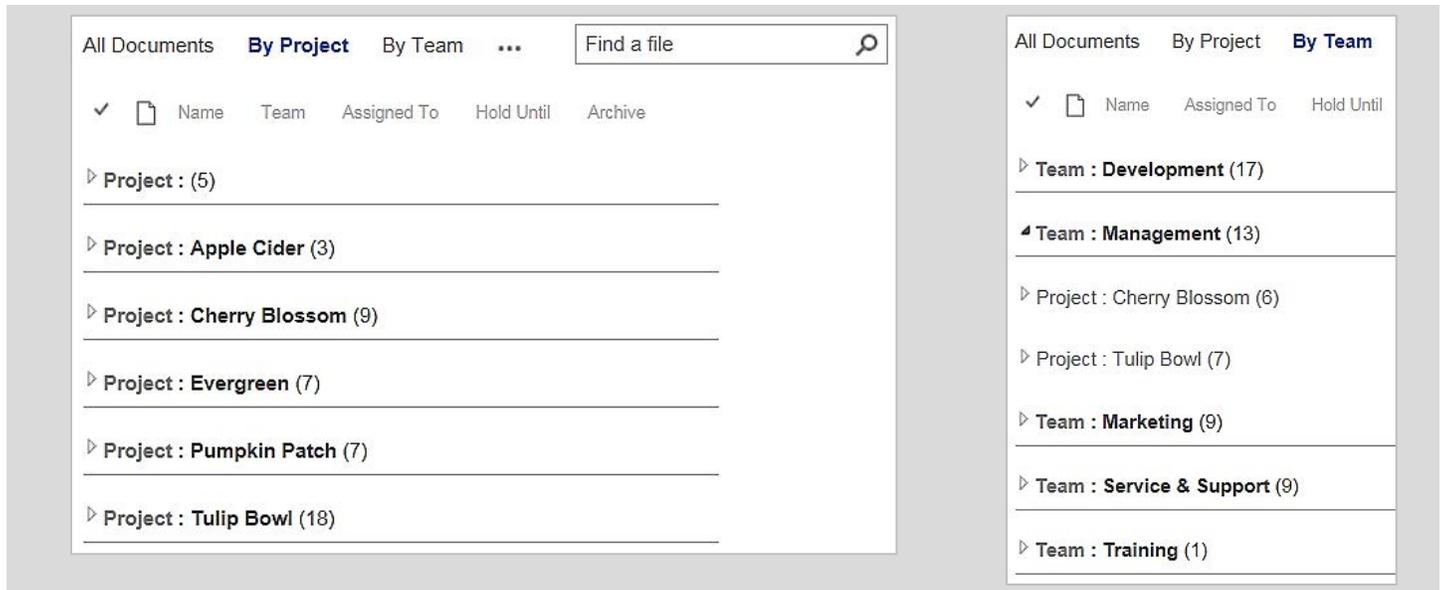
Examples: Group by Project *(left)*; Group by Team, then by Project *(right)*

Sort

- Each view has a built in sort-order, with an optional subsort-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
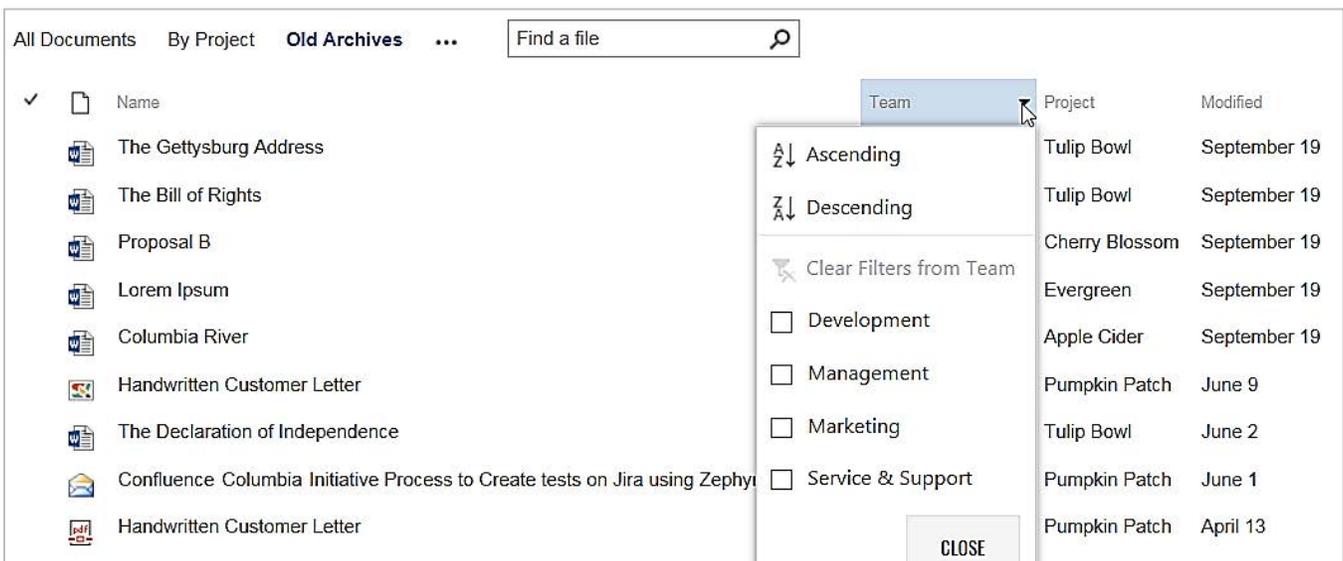
Example: Filter by Old Archives, sort by Modified, can further filter and sort by column header Team

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
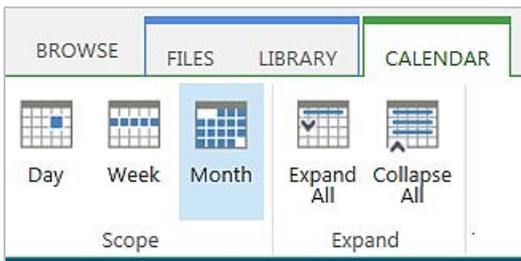- TIP: Show or hide columns in a view for the purpose of bulk editing properties via Quick Edit
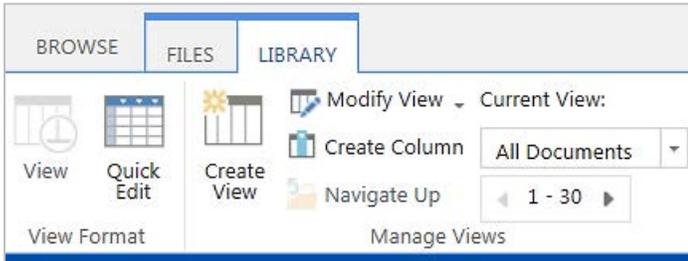
Calendar Format

- 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

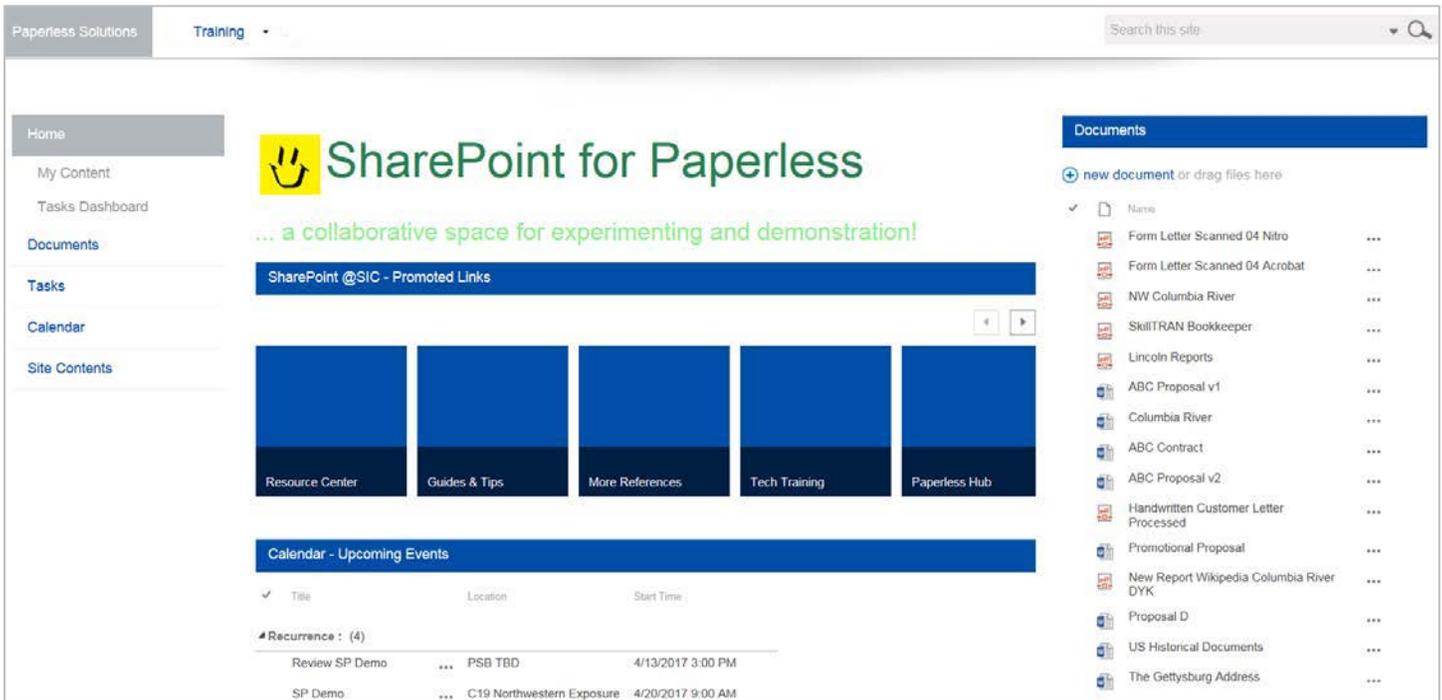## Web Parts

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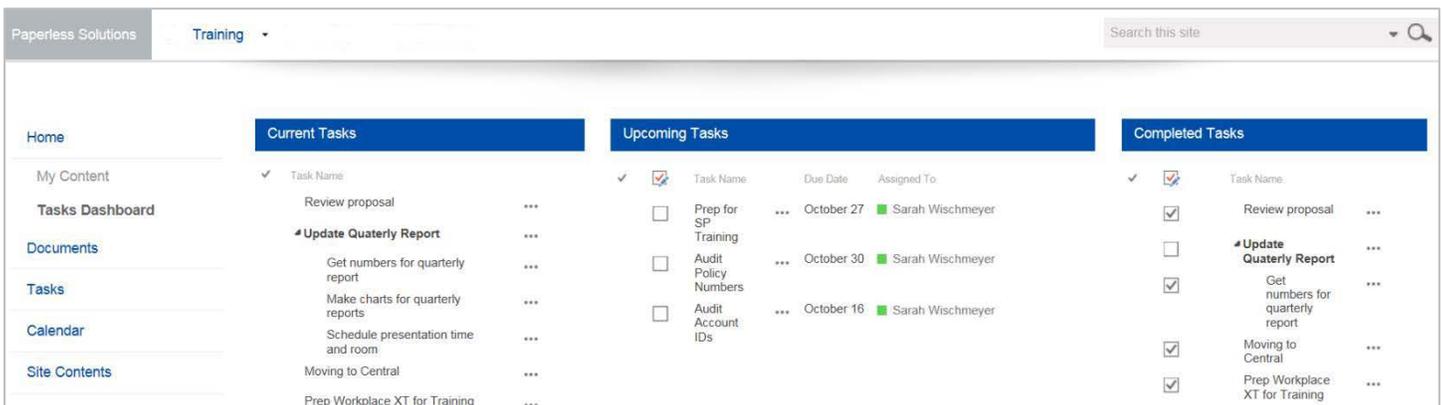
Example: The Task Dashboard shows what's on deck, upcoming, and completed