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Introduction: Why Create a View?

The view feature allows PEPFAR SharePoint users to customize the way they organize and display materials in lists and libraries. Views add another dimension to the organization of content on PEPFAR SharePoint, empowering you to quickly locate right piece of data when you need it, without having to dig through hundreds of items.

Views allow you to *filter the content* in your list or library without creating a flood of folders. Think of folders as little barriers you put between your data. While folders can be an easy way to organize content on your desktop, within SharePoint, an overuse of folders becomes a blocker to efficient content management and can slow down the performance of your page.

By creating personalized views, either for yourself as a "Private View," or for all visitors to your page as a "Public View," you can quickly see prioritized content that you've organized in a list or library. For example, you may want to view all the materials in a library *in one list*, rather than inside of their specified folders. Or, you may want to view all documents tagged the Fiscal Year "2017." The guidance and step-by-step instructions detailed below will help you make the most of views on PEPFAR SharePoint.

Types of SharePoint Views

While the number of view types are limited, you can create a multitude of unique views with each of the different types available. Below, we'll take a look at the various types of views. These are the most common you'll come into contact with, and will likely be the most useful:



PEPFAR SharePoint

Choose a view type



Standard View

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



Datasheet View

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



Calendar View

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



Gantt View

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



Custom View in SharePoint Designer

Start SharePoint Designer to create a new view for this list with capabilities such as conditional formatting.

Standard View

As its name suggests, this is the view you see when first creating a list or library. You can almost always (depending on your list) consider this as the default view. The view showcases your list information in an Excel-like table with the columns that can specify, such as Document Name, Last Modified, Modified by, etc:

[+ new item](#) or [edit this list](#)

All Items ...

✓	First Name	Last Name	Gender	Date of birth	State where he/she was born
	Brad	Pitt	Male	12/18/1963	Oklahoma
	Angelina	Jolie	Female	6/4/1975	California
	Charlize	Theron	Female	8/7/1975	Other Country
	Bradley	Cooper	Male	1/5/1975	Pennsylvania
	Johnny	Depp	Male	6/9/1963	Kentucky
	Emma	Watson	Female	4/15/1990	Other Country
	Jennifer	Lawrence	Female	8/15/1990	Kentucky

Datasheet view

Similar to the standard view, the difference here is you can bulk edit all items in this Excel-type view directly on the page. If you've ever had to edit employee timesheets, you'll understand how this view can be a great benefit:



PEPFAR SharePoint

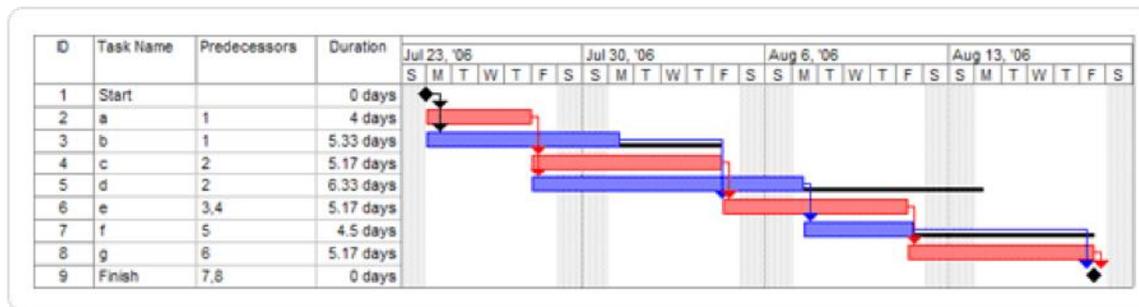
Stop editing this list

All Items **Datasheet View** Date of birth ... Find an item

✓	First Name	Last Name	Gender	Date of birth	State where he/she was born	+
	Brad	Pitt	Male	12/18/1963	Oklahoma	
	Angelina	Jolie	Female	6/4/1975	California	
	Charlize	Theron	Female	8/7/1975	Other Country	
	Bradley	Cooper	Male	1/5/1975	Pennsylvania	
	Johnny	Depp	Male	6/9/1963	Kentucky	
	Emma	Watson	Female	4/15/1990	Other Country	
	Jennifer	Lawrence	Female	8/15/1990	Kentucky	

Gantt view

This is another view that is centered on dates and time. A Gantt chart documents progress of a number of components in time. The Gantt view is ideal for tracking deadlines for invoices or payments coming in, or for other projects that are subject to deadlines and/or progress reports:



Styles for the Standard view

View Style:

- Basic Table
- Boxed, no labels
- Boxed
- Newsletter
- Newsletter, no lines
- Shaded
- Preview Pane
- Default



PEPFAR SharePoint

The options shown in the above screenshot can give your standard list a new look. These styles will not modify any of the list's content; rather, they allow you to view your content in various styles. Below are some examples of how your view would look through one of these style filters:

Basic Table

Displays items in rows:

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Task Name	Assigned To	Due Date
<input type="checkbox"/>		Task 1	... Fabrikam01\Olivier	Friday
<input type="checkbox"/>		Task 2	... Fabrikam01\Otto	December 20
<input type="checkbox"/>		Task 3	... Fabrikam01\Olivier	January 25, 2013

Document details

Displays the files in a library using a layout similar to business cards:

<p>Annual Report Template </p> <p>Name: Annual Report Template </p> <p>Modified: 10/10/2012 9:39 AM</p> <p>Modified By: <input type="checkbox"/> Jon Doe</p>	<p>Board of Directors Welcome Speech </p> <p>Name: Board of Directors Welcome Speech </p> <p>Modified: 10/10/2012 9:39 AM</p> <p>Modified By: <input type="checkbox"/> Jon Doe</p>
<p>New Product Launch Speech </p> <p>Name: New Product Launch Speech </p> <p>Modified: 10/10/2012 9:40 AM</p> <p>Modified By: <input type="checkbox"/> Jon Doe</p>	<p>Sales Department Roadmap- Eastern Region</p> <p>Name: Sales Department Roadmap- Eastern Region</p> <p>Modified: 10/2/2012 9:54 AM</p> <p>Modified By: <input type="checkbox"/> Jon Doe</p>
<p>Sales pitches </p> <p>Name: Sales pitches </p> <p>Modified: 10/10/2012 9:38 AM</p> <p>Modified By: <input type="checkbox"/> Jon Doe</p>	<p>Sales presentations 2011-2012</p> <p>Name: Sales presentations 2011-2012</p> <p>Modified: 10/5/2012 11:38 AM</p> <p>Modified By: <input type="checkbox"/> Jon Doe</p>

Add document

Newsletter

Displays items in rows with lines between the rows:

Task Name	Assigned To	Due Date
Task 1	Fabrikam01\Olivier	10/12/2012
Task 2	Fabrikam01\Otto	12/20/2012
Task 3	Fabrikam01\Olivier	1/25/2013



Newsletter, no lines

Displays items in rows of alternating shades, without the lines between the rows.

Completed	Task Name	Assigned To	Due Date
No	Task 1	Fabrikam01\Olivier	10/12/2012
No	Task 2	Fabrikam01\Otto	12/20/2012
No	Task 3 <small>NEW</small>	Fabrikam01\Olivier	1/25/2013
+ Add new item			

Preview Pane

Displays the name of the items on the left side of the page. When you point to the name of an item, the columns selected for the view are displayed on the right side of the page:

[Talk to customer](#) NEW

[Start planning event](#) NEW

[Order supplies](#) NEW

Title

Assigned To

Completed

Task Status

Priority

Start Date

Due Date

% Complete

Created

Created By

[Talk to customer](#) NEW

[Talk to customer](#)

Yes

Completed

(2) Normal

5/1/2012

5/1/2012

100 %

3/8/2012 4:05 PM

[...](#)

Shaded

Displays items in rows of alternating shades:

<input type="checkbox"/>	Completed	Task Name	Assigned To	Due Date
<input type="checkbox"/>	No	Task 1	Fabrikam01\Olivier	10/12/2012
<input type="checkbox"/>	No	Task 2	Fabrikam01\Otto	12/20/2012
<input type="checkbox"/>	No	Task 3 <small>NEW</small>	Fabrikam01\Olivier	1/25/2013
+ Add new item				

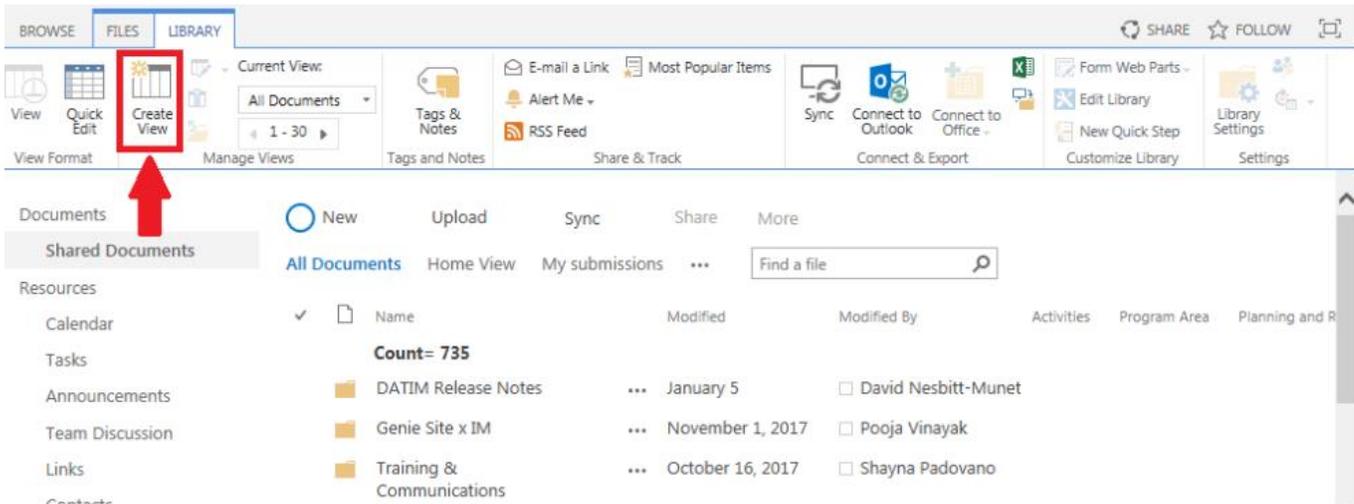


Creating and Using Views

Step 1

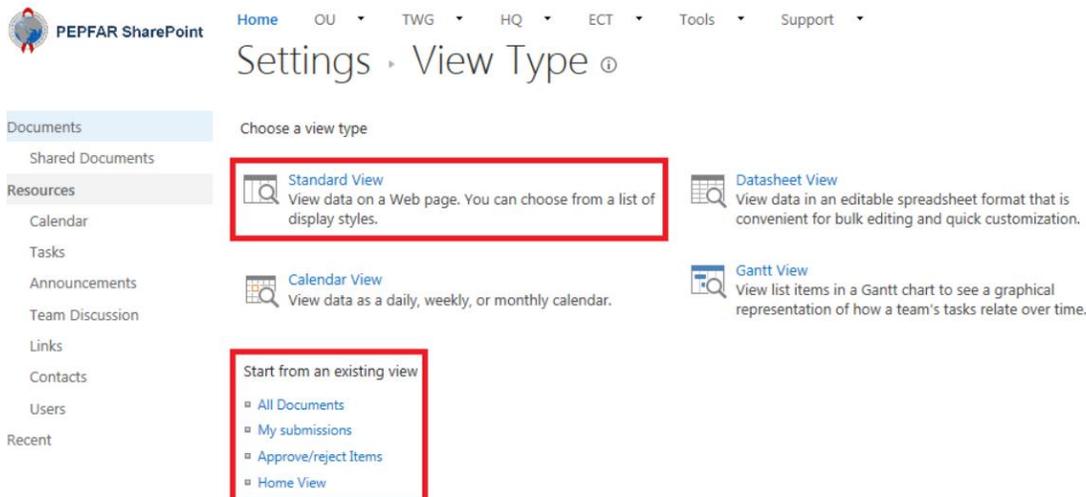
Navigate to the document library for which you wish to create a unique view. Click on the "Library" (or "List") tab on the top left of the screen, and select "Create View:"

Note: If "Create View" is disabled, you don't have the permissions to create a view.



Step 2

This will open up the "View Type" page, from which you can select an "Existing View," or create a customized view within one of the specified view types. In this example, we'll select and customize a "Standard View."





Step 3

In the “View Name” box, type the name for your view. Select “Make this the default view” if you want to make this the default view for the list or library. Only a public view can be the default view for a list or library.

Name
Type a name for this view of the document library. Make the name descriptive, such as “Sorted by Author”, so that site visitors will know what to expect when they click this link.

View Name:

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

Audience
Select the option that represents the intended audience for this view.

View Audience:

- Create a Personal View
Personal views are intended for your use only.
- Create a Public View
Public views can be visited by anyone using the site.

Columns
Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the Position from left box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2
<input checked="" type="checkbox"/>	Modified	3
<input checked="" type="checkbox"/>	Modified By	4
<input type="checkbox"/>	App Created By	5
<input type="checkbox"/>	App Modified By	6
<input type="checkbox"/>	Check In Comment	7

Step 4

In the “Audience” section, select “Create a Personal View” or “Create a Public View.” If you select a personal view, only you will be able to view that page’s content through the view filters; if you select a public view, everyone who visits the page will view the content through your specified view.

Note: If “Create a Public View” is disabled, you don’t have the permissions to create a public view for this list or library.

Step 5

In the “Columns” section, select the columns that you want in the view and clear the columns that you don’t want to appear. Next to the column numbers, select the order that you want to columns to appear in the view.



Step 6

Under the “Sort” section, you can set the order in which items appear in the view. You can have up to two criteria. For example, show the items in a task list sorted by priority and then by due date.

Sort

Select up to two columns to determine the order in which the items in the view are displayed. [Learn about sorting items.](#)

First 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)

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).

Step 7

Under the “Filter” section, you can opt to show all items in the view, or display only a subset of items in the library or list based on your desired specifications:

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

Planning and Reporting Cycle

is equal to

COP

And Or

When column

Fiscal Year

is greater than

2015

[Show More Columns...](#)



Step 8

By expanding the tabs below, you can select from a multitude of other types of settings and filters you can apply to your view. For example, the “Folders” tab allows you to create a view that shows all items in only top-level folders, or without any folders at all:

- [Tabular View](#)
- [Group By](#)
- [Totals](#)
- [Style](#)
- [Folders](#)

Specify whether to navigate through folders to view items, or to view all items at once.

Folders or Flat:

- Show items inside folders
- Show all items without folders

Show this view:

- In all folders
- In the top-level folder
- In folders of content type: ▼

[Item Limit](#)

[Mobile](#)

Adjust mobile settings for this view.

- Enable this view for mobile access
(Applies to public views only)
- Make this view the default view for mobile access
(Applies to public views only)

Step 9

Once you have created your unique view(s), you can easily navigate between them in your list or library. The screenshot below shows a standard “No Folder View,” with all documents viewable without their folders. From this view, I have sorted the “Modified” column into descending order so I can view the most recent files uploaded by all users across this document library.

Home OU TWG HQ ECT Tools Support Search this site

Shared Documents

New Upload Sync Share More

All Documents Natasha's Submissions **No Folder View** Find a file SAVE THIS VIEW

Name	Modified	Modified By	Activities	Program Area	Planning and Reporting Cycle	Fiscal Year	Agency	OU	TI
SupportingFiles	7 hours ago	Jason Pickering							
distrSiteFY18	Yesterday at 12:58 AM	Scott Jackson2							
distrSiteFY17	Yesterday at 12:58 AM	Scott Jackson2							
Overview and Best Practices_Phase 1_Submission	2 days ago	Natasha Madorsky		COP		2018			
Overview and Best Practices_Phase 2_Validation and Distribution	2 days ago	Natasha Madorsky		COP		2018			



From here, I could easily switch back to the default “All Documents” view, or select another one of my unique views. In this case, “Natasha’s Submissions” will allow me to view and sort all documents that I have uploaded to this document library:

Shared Documents ⓘ

○ New Upload Sync Share More

All Documents **Natasha's Submissions** No Folder View ...

📄	Name	...	Modified ↓	...	Modified By ▼	Approval Sta
Approval Status : Pending (93)						
📄	Overview and Best Practices_Phase 1_Submission	...	2 days ago	☐	Natasha Madorsky	Pending
📄	Overview and Best Practices_Phase 2_Validation and Distribution	...	2 days ago	☐	Natasha Madorsky	Pending
📄	COP18 Target Setting DATIM Support Articles Tracker	...	3 days ago	☐	Natasha Madorsky	Pending
📄	FAQs_Target Setting and Datapack Process	...	3 days ago	☐	Natasha Madorsky	Pending

Modifying or Deleting a View

The following steps will show how to modify a view, such as making it the default view, adding or removing columns, and changing the sort order of items in the view. You can also delete a view by following similar steps.

Note: *Once a view is created, you cannot change the view type (for example, you cannot switch from Standard View to Datasheet View, or Gantt view to Calendar view, or vice-versa). You will have to create a new view with the view type you want. If you are just looking to edit columns and rows in lists or libraries quickly, however, you can temporarily change Standard View to Datasheet View by using Quick Edit. To do this, go to the “List” or “Library” tab in the ribbon and click “Quick Edit.” When you are done, the view will go back to what it was previously. Note that you cannot use Quick Edit on views where items are grouped.*

Step 1

Go to the list or library from which you want to change a view and click the “List” or “Library” tab. Click “Modify View,” and select the view you want to change from the “Current View” drop-down list.



Note: If “Modify View” is disabled, you don’t have the permissions to modify the current view. You can, however, modify your personal views.

The screenshot shows the SharePoint interface for a document library. The ribbon includes 'View Format', 'Manage Views', 'Tags and Notes', 'Share & Track', and 'Connect & Export'. The 'Modify View' button is highlighted with a red box. Below the ribbon, the document list is displayed with columns for Name, Modified, Modified By, and Approval Status. The current view is 'Natasha's Submissions'.

Name	Modified	Modified By	Approval Status
Approval Status : Pending (82)			
Touchpoint Agendas & Notes	January 23	Natasha Madorsky	Pending
iSME Support	January 17	Natasha Madorsky	Pending
Open edX - Name TBD	January 23	Natasha Madorsky	Pending
PISA (PEPFAR Information Systems Academy)	January 23	Natasha Madorsky	Pending

Step 2

To delete the view, click the “Delete” button at the top of the page.

To modify the view, use the sections below to make any changes you wish to the view, such as changing the name, column types or order, sort and filtering settings.

Click “Ok” at the bottom of the page.

Home OU TWG HQ ECT Tools Support

Settings Edit View

Buttons: **Delete** (highlighted with a red box), OK, Cancel

Type a name for this view of the document library. Make the name descriptive, such as “Sorted by Author”, so that site visitors will know what to expect when they click this link.

View Name:

Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the Position from left box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2
<input checked="" type="checkbox"/>	Modified	3
<input checked="" type="checkbox"/>	Modified By	4