Microsoft SharePoint 2010

3 – Working with views

CORPORATE LEARNING & DEVELOPMENT

WORKING WITH VIEWS

INFOCUS

Document libraries and lists can quickly become very large and finding the desired information could be difficult. But, there are a number of things that you can do to help find an elusive contact, document or some other item.

You can change the view that you use to display the content of a list or library. You can sort a view by a specific column, such as sorting documents in a library on their modified date. You can filter a list column on a particular value, such as filtering the surname column in a contacts list to see only the contacts whose surname is Smith. And finally, you can use SharePoint's search facility to search on one or more keywords to find the desired information.

In this booklet you will:

- ✓ learn how to change list views in lists and document libraries
- ✓ learn how to sort and filter list views
- ✓ learn how to search for list items and documents

CHANGING VIEWS IN LISTS AND LIBRARIES

Whenever you look at a list or library, you are looking at the default *view* of it. Most lists and libraries have different views that show different columns and apply different sort orders, filters and styles. Here we look at the *Calendar* list which has three views: one displays a summary of events in a calendar style, while the other two show the details in columns but with different filtering set.

Example:

1 We clicked on *Calendar* in the Quick Launch bar to open the *Calendar* list

The default view is Calendar – this is shown in Change View in the breadcrumb trail…

2 Then clicked on *Change View* in the breadcrumb, as shown, to display the available views

3 Next we clicked on **All Events** – this view shows all events but it is filtered so that each recurring event (includes the ↻ icon) appears only once

You can also change views using the ribbon…

4 Then clicked on the *List* tab, and clicked on *All Events* under *Current View* in the *Manage Views* group to display a list of views

5 Then we clicked on **Calendar** to change to *Calendar* view again

This view has sub-views…

6 Finally we clicked on the *Calendar* tab, then click on *Week* in the *Scope* group to display a week's worth of events

For Your Reference…

To *change views*:
1. Open the list or document library
2. Click on *Change View* at the right end of the breadcrumb trail on the *Browse* tab, or
   Click on *Current View* in the *Manage Views* group on the *List*/*Calendar*/*Library* tab

Handy to Know…

- The *All Events* and *Current Events* views of the *Calendar* are formatted in columns (rather than as a calendar) which means that you can filter these views to help find a specific entry. The list items in *All Events* can also be sorted. (See the next page for more information about sorting and filtering.)

SORTING AND FILTERING VIEWS

Although a list or document library could hold a huge number of items, you will be able to rapidly find an item or document with the aid of the filtering and sorting capacity of lists (and libraries). After switching to the most appropriate view, you can apply a filter to reduce the number of items that display and then sort on one column to make it easier to find the item you're after.

Example

1   We clicked on the *Name* column header under *Shared Documents* on the home page to display a drop-down menu

By default, this view is sorted on Name in Ascending order…

2   Then clicked on **Descending** to sort the documents in descending order (i.e., Z to A) based on *Name*

Notice that a downwards-pointing arrow has appeared in the column header showing that the library is sorted on this column. If you had selected to sort in Ascending order, the arrow would point upwards.
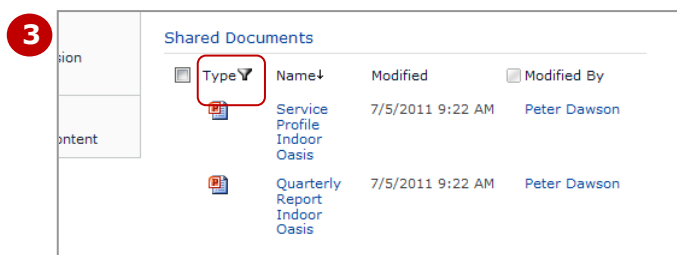
We want to apply a filter to reduce the number of items in the library…

3   We clicked on the *Type* column header and selected **pptx**

The list will be filtered to display only PowerPoint presentations. Notice that the filter icon ▽ has been added to the column header.

You can quickly clear a filter…

4   We clicked on the *Type* column header again and select **Clear Filter from Type**
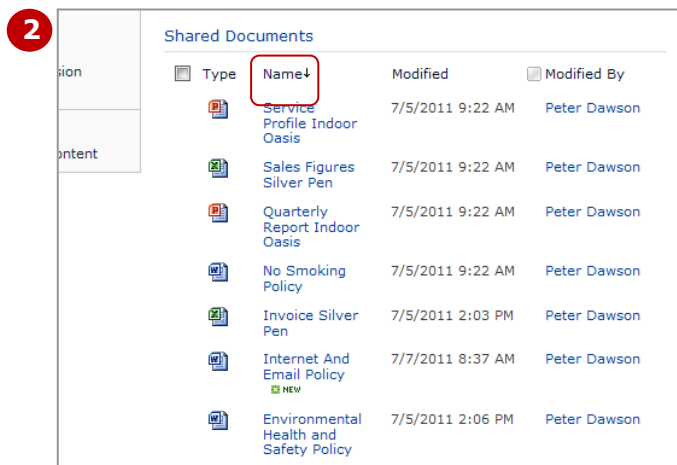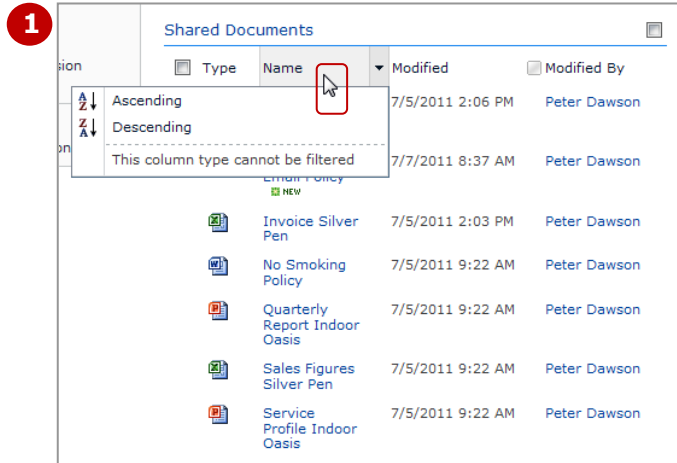
For Your Reference…

To *sort* a *list* or *document library*:

1. Click on the column header and select the desired option from the top half of the menu

To *filter* a *list* or *document library*:

1. Click on the column header and select the desired option from the bottom half of the menu

Handy to Know…

- Any filtering and sorting that you apply to a list or library is not permanent. When you re-open it, the default view will again be applied.
- SharePoint will display all filter options in the drop-down menu unless there are a large number. In this case, a button will display which will let you load them if necessary.

SEARCHING FOR DOCUMENTS AND LIST ITEMS

You can search for anything in SharePoint by typing one or more keywords in the *Search this site* box and clicking on the *Search* tool. The results – which can include documents, 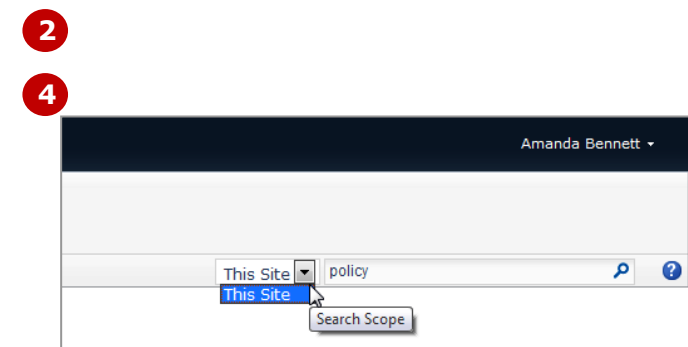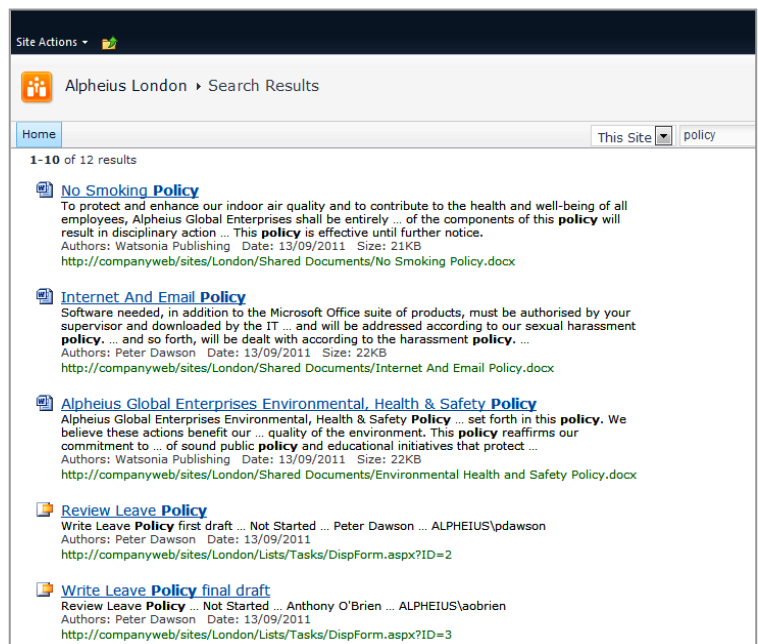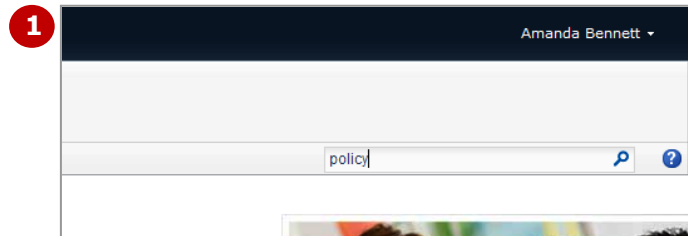tasks, list views and more – will display in the *Search Results* page. You can search from the home page to search the entire site or from within a list or library to search only that list or library.

Example:

1 We clicked on *Search this site* near the top right of the home page and typed **policy**

To search for an exact phrase, surround the keyword in quotation marks e.g., "and" to avoid finding instances like 'sand' or 'banding'…

2 Then we clicked on *Search* 🔍 to display the *Search Results* page

By default, the search results are sorted by relevance: the items with the most instances of the keyword/s are at the top of the list. Our search has found 11 results including links to Word documents, task details, task views and the Shared Documents library…

3 Then clicked on a non-Word document link to open the page, then clicked on the browser's *Back* button to return to the *Search Results* page

4 Finally we clicked on the *Search Scope* drop arrow to the left of the search box

If you had searched from within a list, you could select This Site in the Search Scope menu and click on Search 🔍 to search the entire site…

1

Amanda Bennett ▾

policy 🔍 ❓

2

Site Actions ▾

Alpheius London ▸ Search Results

Home | This Site ▾ | policy

1-10 of 12 results

No Smoking Policy
To protect and enhance our indoor air quality and to contribute to the health and well-being of all employees, Alpheius Global Enterprises shall be entirely … of the components of this **policy** will result in disciplinary action … This **policy** is effective until further notice.
Authors: Watsonia Publishing   Date: 13/09/2011   Size: 21KB
http://companyweb/sites/London/Shared Documents/No Smoking Policy.docx

Internet And Email Policy
Software needed, in addition to the Microsoft Office suite of products, must be authorised by your supervisor and downloaded by the IT … and will be addressed according to our sexual harassment **policy**. … and so forth, will be dealt with according to the harassment **policy**. …
Authors: Peter Dawson   Date: 13/09/2011   Size: 22KB
http://companyweb/sites/London/Shared Documents/Internet And Email Policy.docx

Alpheius Global Enterprises Environmental, Health & Safety Policy
Alpheius Global Enterprises Environmental, Health & Safety **Policy** … set forth in this **policy**. We believe these actions benefit our … quality of the environment. This **policy** reaffirms our commitment to … of sound public **policy** and educational initiatives that protect …
Authors: Watsonia Publishing   Date: 13/09/2011   Size: 22KB
http://companyweb/sites/London/Shared Documents/Environmental Health and Safety Policy.docx

Review Leave Policy
Write Leave **Policy** first draft … Not Started … Peter Dawson … ALPHEIUS\pdawson
Authors: Peter Dawson   Date: 13/09/2011
http://companyweb/sites/London/Lists/Tasks/DispForm.aspx?ID=2

Write Leave Policy final draft
Review Leave **Policy** … Not Started … Anthony O'Brien … ALPHEIUS\aobrien
Authors: Peter Dawson   Date: 13/09/2011
http://companyweb/sites/London/Lists/Tasks/DispForm.aspx?ID=3

4

Amanda Bennett ▾

This Site ▾ | policy 🔍 ❓
This Site
Search Scope

For Your Reference…

To *search* for *documents* and *list items*:

1. Click on *Search this site* on the *Browse* tab, either in the home page to search the site or in a list/library to search the list
2. Type a keyword(s)
3. Click on *Search* 🔍
4. Click on the desired link

Handy to Know…

- Searching in SharePoint Server is more powerful than searching in SharePoint Foundation. SharePoint Server lets you search all SharePoint sites within a large organisation, as well as content that exists outside SharePoint. SharePoint Foundation only lets you search within your own site.

CONCLUDING REMARKS

Congratulations!

You have now completed the **Working with views** booklet. This booklet was designed to get you to the point where you can competently perform a variety of operations as listed in the objectives on page 2.

We have tried to build up your skills and knowledge by showing you specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

Where To From Here...

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.

- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- visit CLD's e-learning zone on the Intranet

- read computer magazines - there are often useful articles about specific techniques

- if you have the skills and facilities, browse the Internet, specifically the technical pages of the application that you have just learnt

- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others

- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way

- and of course, there are also more courses and booklets for you to work through

- finally, don't forget to contact CLD's IT Training Helpdesk on **01243-752100**