

**Views**  
in SharePoint

# Tips & Tricks

Hints to help you master  
document management.

# What's a "view"?

- Everything stored in SharePoint is an item in a list or a library, and these lists and libraries can get very large. A view is a set of filters and styles to show, in different ways, the information available in lists and libraries.

Diagram illustrating the concept of a "view" in SharePoint. It shows two instances of the "DW-GOM Controlling Documents Teamspace" library, connected by arrows labeled "Same Library" and "Different View".

The left instance shows the "All Documents" view, displaying a list of documents and folders. The right instance shows the "HSE0008 OPS Referenced Documents Part 1" view, displaying a filtered list of documents.

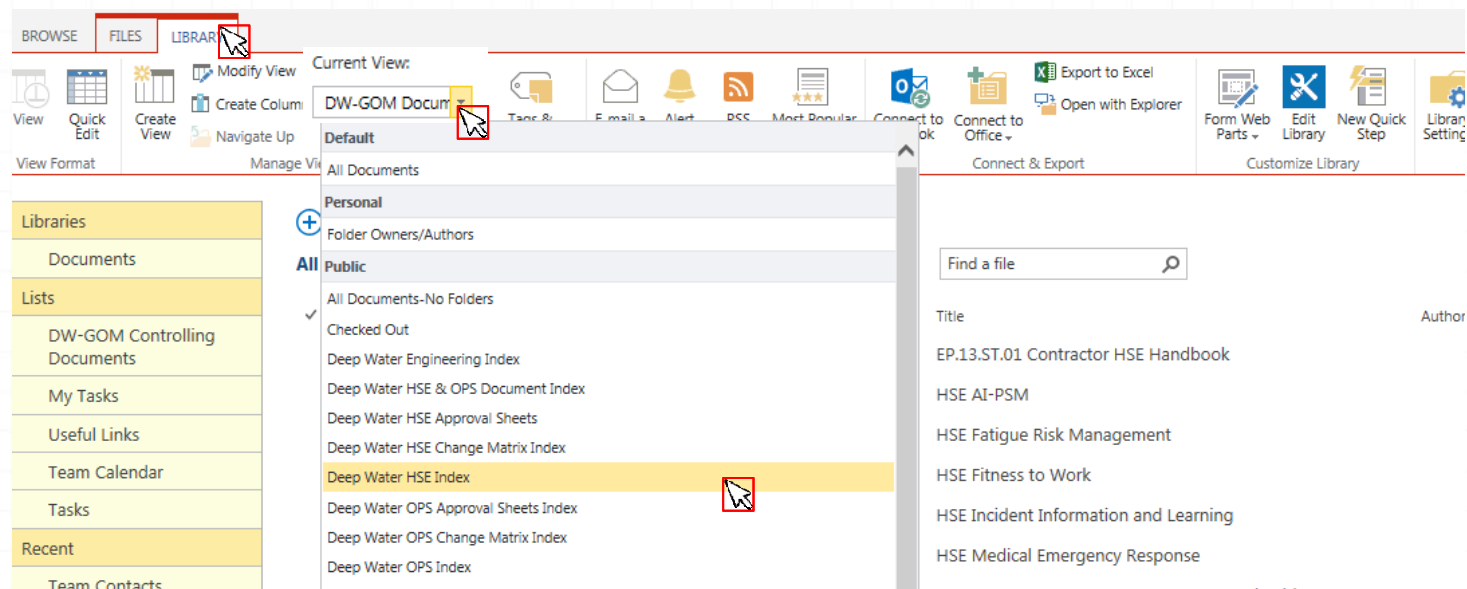
A text box explains: "A view allows us to pare down our entire document library to just those OPS documents referenced in HSE0008. The benefits?"

- Because it's a view, and not a webpage, revised documents will show up automatically, and not become broken links, **as long as metadata is set correctly.**
- The folders we use to manage permissions are hidden, and don't get in the way of quick end user navigation.

- Creating a view to display or hide library items **changes nothing about the items displayed**: not their metadata, location, or permissions. It simply filters a library to show only items of particular interest.
- As an Owner or Custodian of your document and folders, and a contributor to the Lean library, you will be able to **create additional views**, both personal (for your own use) and public (to share with others).

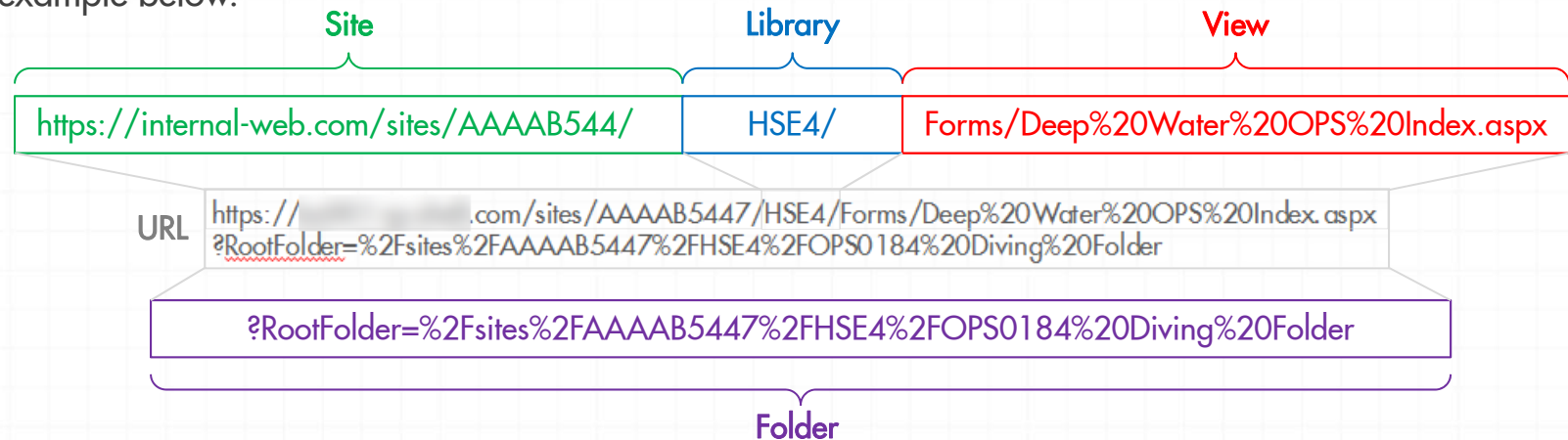
# Applying Views

- ❑ When you look at a library in SharePoint, you are always seeing a default view applied, normally the All Documents view.
- ❑ To apply a specific view to the library or folder you're in:
  1. Go to the **LIBRARY** ribbon.
  2. Click the **Current View** dropdown.
  3. Select a view to apply.



# Linking to a View

- SharePoint URLs contain information for specific views of site/library/folder locations as shown in the example below.

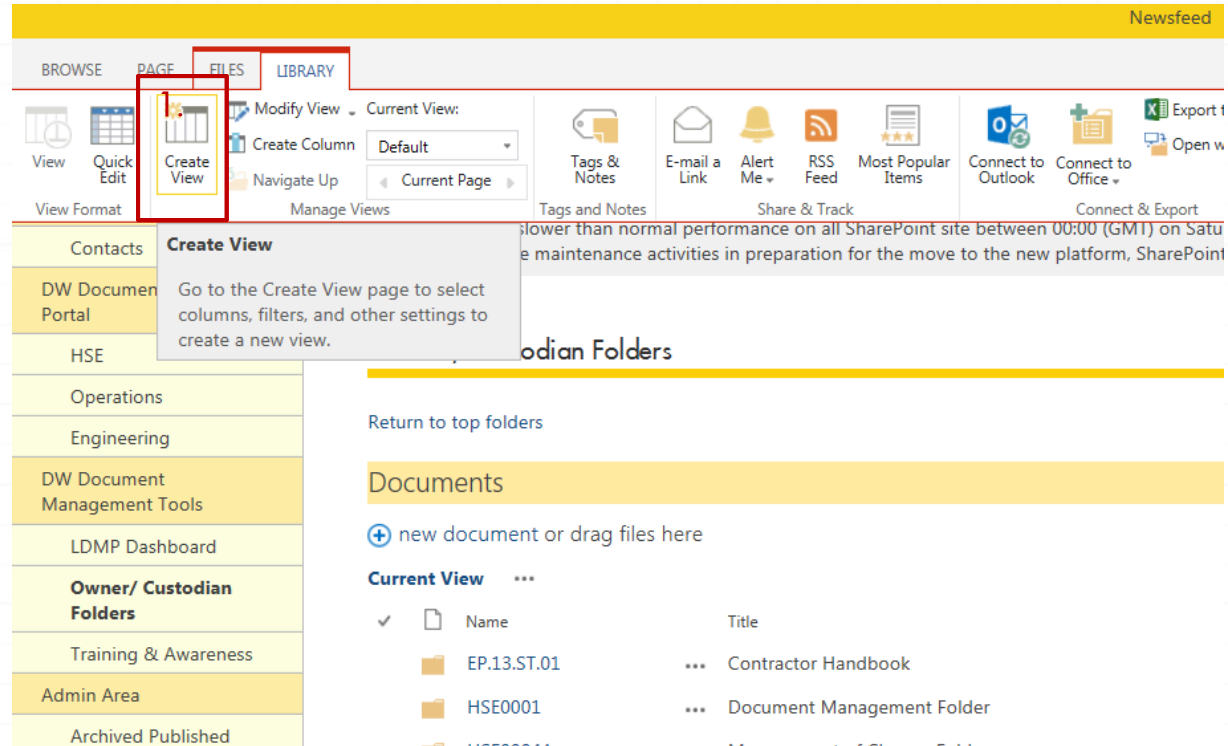


- These URLs can be sent in emails or linked from webpages and web parts to direct users to exactly the desired information within a library.

# Creating a View

As an example, the steps below create a view for an Owner to see all of the Lean controlling documents he or she is accountable for, who their custodians are, and when they are up for review.

1. To start your new view, go to the **LIBRARY** ribbon and click the **Create View** tool.  
*Note: Views are created at the library level, and can only be used within a library and its folders.*





# View Type

2. Select a type for your view, or an existing view to use as a basis. We'll use **Standard View**.

## Settings ▸ View Type ⓘ

### Choose a view type

2.



#### 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.



#### Access View

Start Microsoft Access to create forms and reports that are based on this list.



#### Custom View in SharePoint Designer

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

### Start from an existing view

- ▣ All Documents
- ▣ Records
- ▣ Checked Out
- ▣ Inbox
- ▣ Deep Water HSE Index
- ▣ Deep Water OPS Index
- ▣ Deep Water Engineering Index

For our document library, Standard View and Datasheet View are the most useful types. Most of our existing views are standard views.

# View Name and Audience

3. Name the view.

4. Set the audience as Personal.

*Note: Only you can apply your personal views; your public views are available to everyone. If you choose to create a public view, note the option to make it the default view. Checking this option will apply your view as the default to the entire library for all users. This is **NOT** recommended.*

## Settings ▸ Create View ⓘ

### 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.

3. View Name:

My Owned Documents

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

### Audience

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

View Audience:

4. ☒ 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 (Metadata) to Display

5. Use the check boxes/dropdowns to select/order the metadata columns you want to see in your view. For this view, we'll display the **Type**, **Name**, **Author**, and **Next Review date**, in that order.

*Note: You may have to hunt up and down the alphabetical list to find the column you want, check it, and set its position. When you save the view, the ones you've chosen to display will appear at the top of the list as shown.*

## Columns

Select or clear the check box next to each column you want to show or hide in this view on 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"/>	Author	3
<input checked="" type="checkbox"/>	Next Review Date	4
<input type="checkbox"/>	App Created By	6
<input type="checkbox"/>	App Modified By	7
<input type="checkbox"/>	Approval Request for a New or Revised Document Using This Workflow	8
<input type="checkbox"/>	Approval Request to Delete a Document Using This Workflow	9
<input type="checkbox"/>	Attachment	10
<input type="checkbox"/>	Business	11
<input type="checkbox"/>	Business Function	12
<input type="checkbox"/>	Business Process	13
<input type="checkbox"/>	Business Unit/Region	14
<input type="checkbox"/>	Categories	15
<input type="checkbox"/>	Category	16
<input type="checkbox"/>	Cc	17
<input type="checkbox"/>	Cc-Address	18
<input type="checkbox"/>	Check In Comment	19
<input type="checkbox"/>	Checked Out To	20



# Sorting


6. Select how you want items displayed to be sorted. Here we'll use the Next Review Date column to display documents in order of which need to be reviewed soonest.


## 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:


Next Review Date


6. ☒  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).


# Filtering

7. Choose how to filter data displayed. Here we'll opt to only display documents for which Jeff Walter is the Owner.


## 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.](#)


7. ☐  Show all items in this view

☒  Show items only when the following is true:

7. Show the items when column


Owner 


is equal to 

Jeff Walter 

☐ And ☒ Or

When column

None 

is equal to 

[Show More Columns...](#)

# Displaying Folders

8. Specify whether or not you want to display the folder structure, or see a flattened list of documents. We will opt to view the documents themselves, and not the folders that contain them.

⊕ 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

8.

Show this view:

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

(We've skipped a number of options that are generally not as useful in our document library, but you may wish to explore them for use in other libraries.)

# Item Limit

9. Next you have the option to determine how many items your view will return, how many it will display at once, etc. We'll just keep the default of 30, since that should accommodate all of the documents in our view.

## Item Limit

Use an item limit to limit the amount of data that is returned to users of this view. You can either make this an absolute limit, or allow users to view all the items in the document library in batches of the specified size. [Learn about managing large lists.](#)

Number of items to display:

30

9. ☒ Display items in batches of the specified size.  
☐ Limit the total number of items returned to the specified amount.

10.

OK

Cancel

10. Once you're satisfied with the options you've selected for your view, click OK.

# The Result

- By applying the view we've just created, as an Owner, you can see only the documents you're accountable for, instead of the entire library.

## DW-GOM Controlling Documents Teamspace

new document or drag files here

All Documents Folder Owners/Authors My Owned Documents ... Find a file

Name	Title	Author	Modified	HSE Referenced Docs
EP.13.SY01 Contractor HSE Handbook	EP.13.ST.01 Contractor HSE Handbook		16 September	
HSE AI-PSM	HSE AI-PSM		2 August	
HSE Fatigue Risk Management	HSE Fatigue Risk Management		2 August	
HSE Fitness to Work	HSE Fitness to Work		2 August	
HSE Incident Information and Learning	HSE Incident Information and Learning		20 July	
HSE Medical Emergency Response	HSE Medical Emergency Response		21 July	
HSE0001 Document Management Manual Folder	HSE0001 Document Management Manual Folder	Bart Soileau	6 days ago	
HSE0004A Management of Change Folder	HSE0004A Management of Change Folder	Evelio Hernandez	6 days ago	HSE Referenced Docs
HSE0005 Respiratory Protection Folder	HSE0005 Respiratory Protection Folder	Bart Soileau	13 September	
HSE0006 GOM Local Audit Process (LAP) for the HSE-OPS BCDs Folder	HSE0006 GOM Local Audit Process (LAP) for the HSE-OPS BCDs Folder	Bart Soileau	13 September	HSE Referenced Docs
HSE0007 Hearing Conservation Program (HCP) Folder	HSE0007 Hearing Conservation Program (HCP) Folder	Bart Soileau	13 September	
HSE0008 Safe Work Planning and Authorization (SWPA)	HSE0008 Safe Work Planning and Authorization (SWPA)			

FILES LIBRARY

Create View

Current View: All Documents

Default

Personal

Folder Owners/Authors

My Owned Documents

Public

Auth

OM Controlling

All Documents-No Folders

## DW-GOM Controlling Documents Teamspace

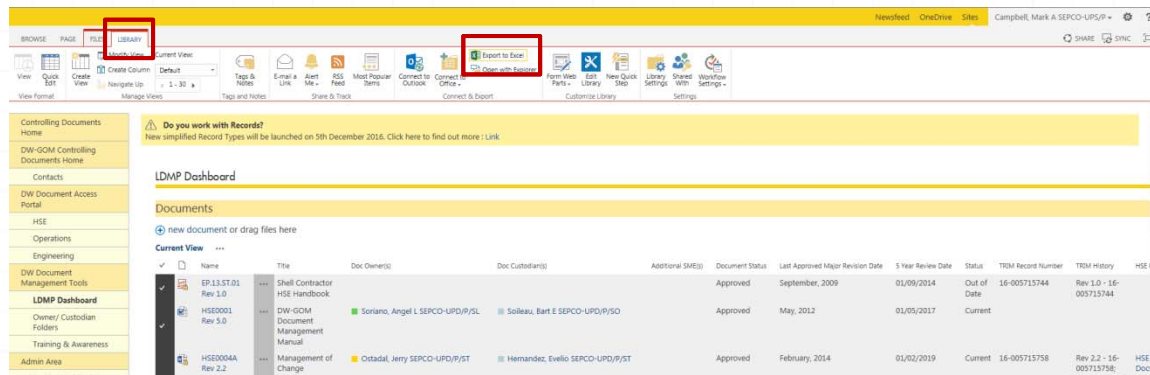
new document or drag files here

All Documents Folder Owners/Authors My Owned Documents ... Find a file

Name	Author	Next Review Date
HSE0138-PR01 Rev 0.1	Claude Allen	April, 2017
HSE0151 Rev 4.0	Bill Wester	April, 2020
HSE0151 Rev 4.0	Bill Wester	April, 2020
HSE0007-PR01 Rev 5.0	Bart Soileau	August, 2018
HSE0005 Rev 2.0	Bart Soileau	August, 2018
OPS0103A-PR01 Rev 0.0	Bart Soileau	December, 2017
OPS0033-PR01 Rev 2.0	Bart Soileau	February, 2017
HSE0136A-PR01 Rev 2.0	Robert Perilloux	January, 2020
HSE0078 Rev 2.5	Wil Kwuimo	June, 2017
HSE0142-SP01 Rev 2.0	Inger Pranger	March, 2019
HSE0006-PR01 Rev 1.4	Bart Soileau	May, 2018
HSE0046A Rev 3.1	Brett Tatar	November, 2017

# Exporting Views to Excel

- One other potentially useful aspect of SharePoint views is that they can be exported to Excel. For example, if you want to export the LDMP Dashboard to Excel, you just go to the **Connect & Export** section of the **LIBRARY** tab and click the **Export to Excel** button. You'll have the option of opening the Excel file or saving it. As you can see from snippet below, the exported Excel file even preserves the links from the SharePoint View.



Do you want to open or save owssvr.igq from eu001-sp.shell.com?

Open

Save

Cancel

Name	Title	Doc Owner(s)	Doc Custodian(s)	Additional SHES
1. EP-13-ST-01 Rev 1.0.pdf	Shell Contractor HSE Handbook			
2. HSE0001 Rev 5.0.docx	DW-GOM Document Management Manual	Soriano, Angel L SEP-UPD/P/SL#888	Soleau, Bart E SEP-UPD/P/SL#180	
3. HSE0004A Rev 2.2.docx	Management of Change	Ostadal, Jerry SEP-UPD/P/ST#1535	Hernandez, Evelio SEP-UPD/P/ST#1675	
4. HSE0005 Rev 2.0.docx	Respiratory Protection	Walter, Jeffrey S SEP-UPD/P/SL#180	Soleau, Bart E SEP-UPD/P/SL#180	
5. HSE0006-PMO Rev 3.4.docx	DW Local Audit Process (LAP) for the HSE/OPS BCDs	Walter, Jeffrey S SEP-UPD/P/SL#188	Soleau, Bart E SEP-UPD/P/SL#180	
6. HSE0007-PMO Rev 5.0.docx	Hearing Conservation Program (HCP)	Walter, Jeffrey S SEP-UPD/P/SL#188	Soleau, Bart E SEP-UPD/P/SL#180	
7. HSE0008 Rev 5.2.docx	HSE0008 Rev 5.2 Safe Work Planning and Authorization (SWPA) System	Ostadal, Jerry SEP-UPD/P/ST#1535	Camardelle, Christopher J SEP-UPD/P/SL#52	
8. HSE0010-PMO Rev 3.0.docx	DW HSE Competency Assurance Folder	Ostadal, Jerry SEP-UPD/P/ST#1535	Beaver, Tom T SEP-UPD/P/ST#1846	
9. HSE0011-PMO Rev 3.0.docx	DW-GOM Hazard Communication (HacCom) Program Requirements	Wester, Bill H SEP-UPD/P/SL#1809	Leamont, Jonathan M SHLOL SHA/U#141	
10. HSE0014 Rev 1.pdf	Case	Ostadal, Jerry SEP-UPD/P/ST#1535	Kim, Byung Kyu SEP-UPD/P/ST#1994	
11. HSE0036-SPS Rev 0.0.docx	Hazards and Effects Management Process (HEMP and ALARP)	Ostadal, Jerry SEP-UPD/P/ST#1535	Pranger, Inger A SEP-UPD/P/SL#2893	