



Introduction

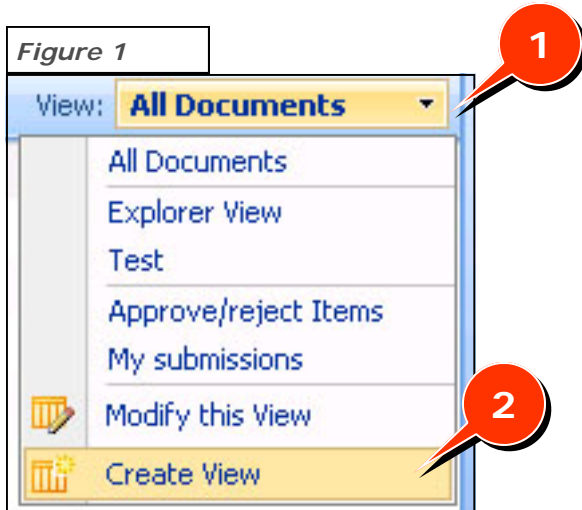
The Create View option allows you to set up information in a list or library the way you need to view it. You can create filters, groups, totals and sort the information. You can create private views (only visible to you) or public views (views available to everyone, only creatable by site owners).

Create Custom View

Create a customized view.

1. Open your **SharePoint** site.
2. Click on a **List** or a **Library** from the Quick Launch menu.
3. Click on the **Drop down arrow** next to View (Fig 1, 1).
4. Select **Create View** (Fig 1, 2).

Figure 1



Process Summary

Customize View

1. Create
2. Columns
3. Sort
4. Filter
5. Group
6. Totals
7. Style
8. Folders
9. Item Limit
10. Mobile

New Customized View

1. View

Modify

1. Change
2. Delete

5. Under **Choose a View Format** select the view you would like. NOTE: the **Standard View** will work for most situations.
6. Give your view a **Name**.
7. Select **Make this a default view** if you would like this to be the view every time you enter this area. NOTE: This will only work if you have permission and if this is a public view.
8. Select if you want this to be a **Public** or **Personal** view. Everyone in your team will be able to access the public view. NOTE: Only site owners can create a public view.
9. Select the **Columns** to be shown in your view.
10. Select the **Position** for your columns.

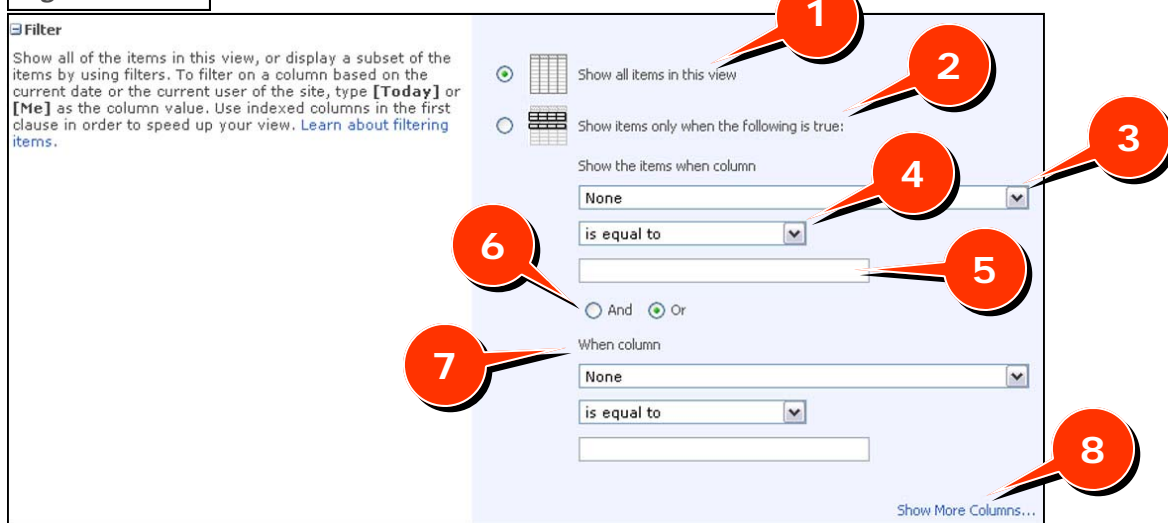
Sort

11. In the **First sort by the column** drop down menu, select the first column you would like sorted. If you would like to sort by another column, select the column from the **Then sort by the column** drop down menu.

Filter

12. Under filter leave **Show all items in this view** (Fig 2, 1) if you would like to see everything, and skip to group by.
13. To filter items select **Show items only when the following is true** (Fig 2, 2).
14. In the **Show the items when column** (Fig 2, 3) drop down menu select the column.
15. Select the **Operator** (Fig 2, 4).
16. In the text box type the **Information** (Fig 2, 5) you want to sort by.
17. If you need to filter by more information select **And** or **Or** (Fig 2, 6) and complete the **When column** (Fig 2, 7) the same way you did the first column or skip to group by.
18. If you need to filter by more columns click on **Show More Columns** (Fig 2, 8).

Figure 2



Group

19. In the **First group by the column** drop down menu, select the first column you would like to group by. If you would like to group by another column, select the column from the **Then Group by the column** drop down menu.
20. Select **Collapsed** to have the view collapsed or select **Expanded** to have the view automatically expanded.
21. In **Number of groups to display per page** type in the number of groups you would like to see per page.

Totals

22. If you would like a total for one of your columns select type of calculation by selecting the **Drop down menu** next to the column or columns.

Style

23. Under style select the type of **View Style** you would like.

Folders

24. Under folders you can select **Show items inside folders** to have all items in a folder or **Show all items without folders** to view everything at once.

Item Limit

25. Under item limit select **Display item in batches of the specified size** and type an amount in the **Number of items to display**. This will show the results in batch files of the amount you set. Select **Limit the total number of items returned to the specified amount** and type an amount in the **Number of items to display** to show only the amount of items you specified.

Mobile

26. If you will be viewing this information with a Mobile device you can select **Make this a mobile view**. Select **Make this a default mobile view** if this the view you want displayed all the time.
27. Click **Ok** to complete the customized view.

View Your New Customized View

After you create your view you will be automatically directed to your new view.

1. Click on the **List** or **Library** where you created your view.
2. Click on the **Drop down menu** next to view.
3. Select your **Custom view name**.
4. You will now see your view.

Modify or Delete Your Customized View

After you have created a view you can modify the view.

1. Click on the **List** or **Library** where the view exists.
2. Click on the **Drop down menu** next to view.
3. Select your **Custom view name**.
4. Go back to the **Drop down menu** next to view.
5. Select **Modify this view**.
6. Make the changes to your view and click **Ok**.

Delete

1. Click on the **Delete** button.
2. Click **Ok** to the pop up.