

SPO Members – Managing Views User Guide

Last revised: March 2021
Last reviewed: March 2021
Next review: March 2022

Ministry of SaskBuilds and Procurement

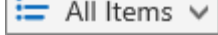
This document provides instructions and support for using the "create view" feature available in SharePoint Document Libraries.

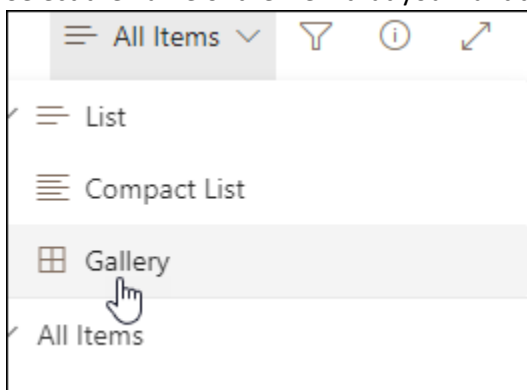


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Select a Different View

- In the command bar of your list, select View options. 
- Select the name of the view that you want to switch to. Select from List, Compact List, or Gallery view options.



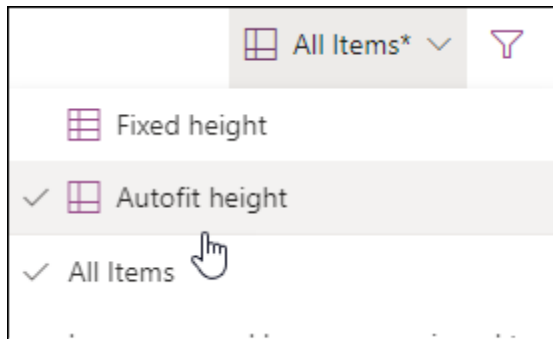
- When you're in grid view mode, you'll see options for Fixed height and Autofit height

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- When you're not in grid view mode, you see different view types: List, Compact list, and Gallery. Below the All items option, you can choose any other views that are available.

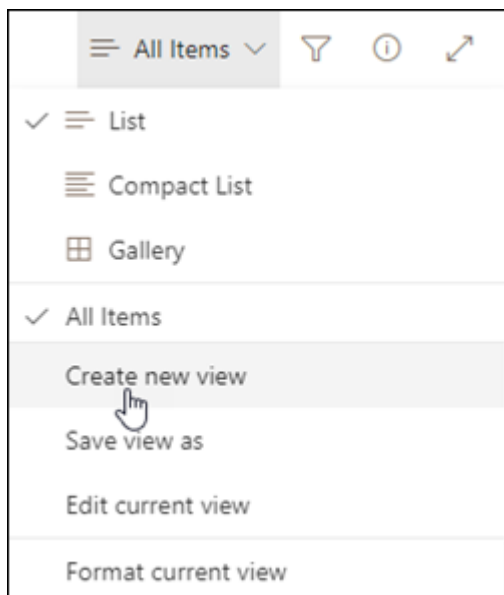
You can also customize the view that you see by choosing different sort, filter, or group selections that you make from the column headers or from the filters pane. When you like what you see, you can save a new view.

Create A View

- In the command bar of your list, select “View Options”
 - If View Options isn't visible, make sure you're not editing the list or you haven't selected one or more items. Also, you may not have permission. In that case, contact the Microsoft 365 Admin or the site or list owners.



- Select “Create New View”



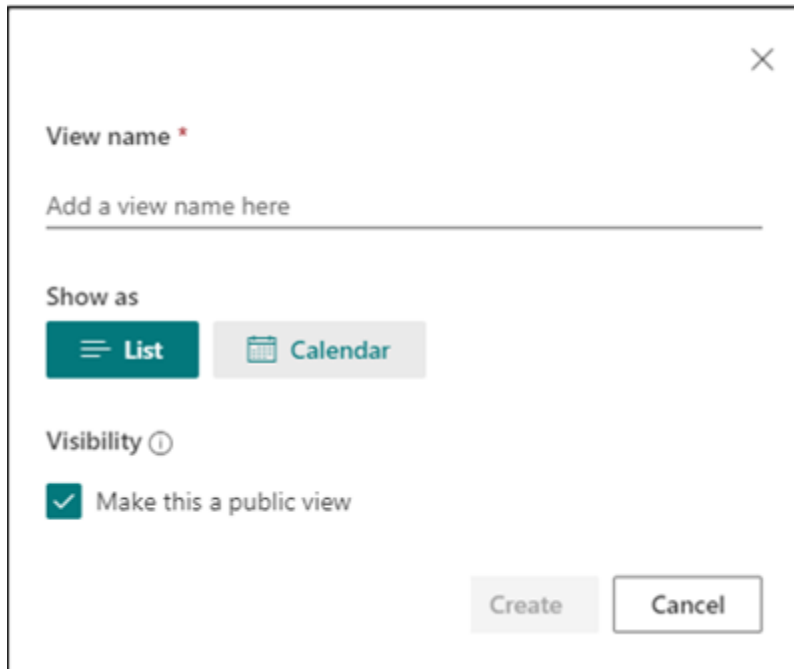
- Under “View Name”, enter a name for your view
- Under “Show As”, select “List” or “Calendar” for the type of view you want to create

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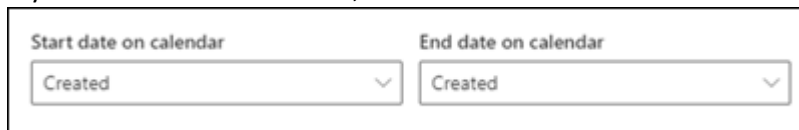
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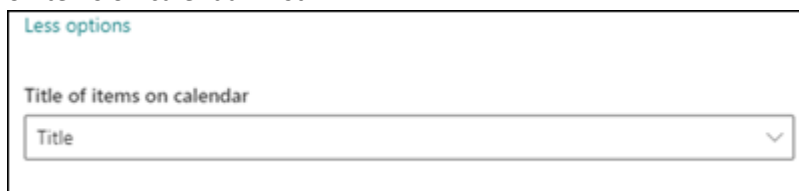
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- If you select “Calendar View”, enter a start date and end date on the calendar.




- To change how the title of items appear on the calendar, select “More options” and then select from the “Title of items on calendar” list



- When you’re finished, select “Create”

Create a New View based on a Current One

- In the command bar of your list, select “View Options” 
 - If View Options isn’t visible, make sure you’re not editing the list or you haven’t selected one or more items. Also, you may not have permission. In that case, contact the Microsoft 365 Admin or the site or list owners.
- Select “Save View As”
- Enter new name, and select OK
- Make any changes you wish to see in your new view and save again

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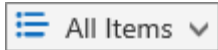
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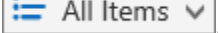
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Change A View

- You can make some changes directly in your list view. To do this, click the column name. You can change the order of items, filter them, group them, add columns, and change other column settings. When you are finished, click “View options” and then click “Save view as”. Save the view with its current name, or enter a new name to create a new view.
- To see more advanced options:
 - In the command bar of your list, select View options 
 - Select the name of the view that you want to change.
 - Select View options again, and then select Edit current view.
 - On the Edit View page, make your changes. You can add or remove columns, add sort or filter criteria, configure folders, and more.
 - When you are finished with your changes, select OK.

Change the Default View

- In the command bar of your list, select View options 
- Select the name of the view that you want to make the default.
- Select View options again, and then select Edit current view.
- On the Edit View page, select the “Make this the default view” check box and then “OK”.