



Working with Lists and Libraries SharePoint 2013

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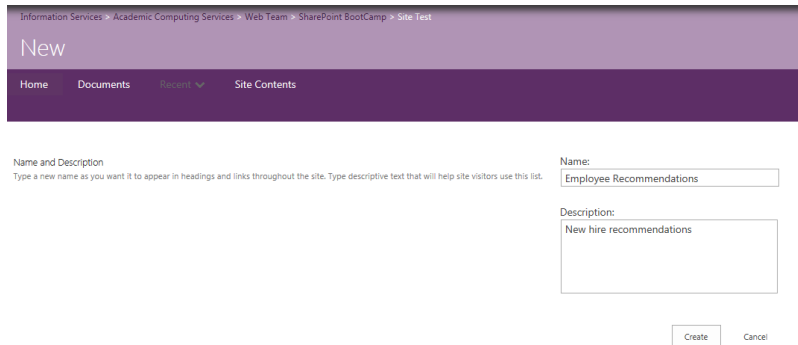
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Creating Custom Lists

You need to create a list and the templates you have to choose from don't fit your needs. Create a custom list where you can create columns that meet your specifications.

We will demonstrate how to create a custom list using the following scenario: a recruiter in HR wants to use a list that collects the names of potential new hires.

1. Go to the Settings Gear Icon.
2. From the drop down menu click on Add an App
3. Select Custom List.
4. Click on Advance Options.
5. Enter the name of the List.
6. Enter a description.
7. Click Create.



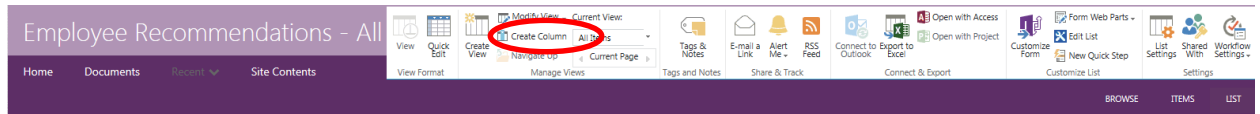
The default column for a list is Title. You can change the name of this column to something else to repurpose it.

1. The list should automatically open after you click create.
2. If the ribbon does not appear automatically click on List on the Quick Launch bar.
3. Click on List Settings on the ribbon.
4. Scroll down the page to the Columns section and click on Title.
5. In the Column name box type in the new name.
6. Fill in a brief description of what the information in the column represents.
7. If the column is required to contain information select Yes, if not select No.
8. Enforce unique values, this prevents users from duplicating data. If some data to be entered is the same accept the default of No.
9. Set a maximum number of characters.
10. The default value should be left as text.
11. Click Ok.

Creating Columns

Before you create your columns make sure you know what type of data will be entered into the column. There are 2 ways to create a column.

- a. Click on List on the Quick Launch bar and select Create Column.



- b. Or click on List Settings and scroll down to the Columns section and click on Create column.

List Information

Name: Employee Recommendations
Web Address: https://sharepoint.wcupa.edu/vp/IS/acad/webteam/bootcamp/st2/Lists/Employee Recommendations/AllItems.aspx
Description: New hire recommendations

General Settings Permissions and Management Communications

- ▢ [List name, description and navigation](#)
- ▢ [Versioning settings](#)
- ▢ [Advanced settings](#)
- ▢ [Validation settings](#)
- ▢ [Audience targeting settings](#)
- ▢ [Rating settings](#)
- ▢ [Form settings](#)
- ▢ [Delete this list](#)
- ▢ [Save list as template](#)
- ▢ [Permissions for this list](#)
- ▢ [Workflow Settings](#)
- ▢ [Enterprise Metadata and Keywords Settings](#)
- ▢ [Generate file plan report](#)
- ▢ [Information management policy settings](#)
- ▢ [Record declaration settings](#)
- ▢ [RSS settings](#)

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Full Name	Single line of text	
Modified	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

- ▢ [Create column](#)
- ▢ [Add from existing site columns](#)
- ▢ [Column ordering](#)
- ▢ [Indexed columns](#)

Single Line of Text Column

1. Click on Create Column from the List ribbon.
2. In the column name box enter the name of the column.
3. Select Single line of text from the type of information in this column is section.
4. Enter a description for the column.

5. Require that this column contains information, yes or no.
6. Enforce unique values, no.
7. Maximum number of characters.
8. Default value, text is the default.
9. Click Ok.

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

☒ Single line of text
☐ Multiple lines of text
☐ Choice (menu to choose from)
☐ Number (1, 1.0, 100)
☐ Currency (\$, ¥, €)
☐ Date and Time
☐ Lookup (information already on this site)
☐ Yes/No (check box)
☐ Person or Group
☐ Hyperlink or Picture
☐ Calculated (calculation based on other columns)
☐ Task Outcome
☐ External Data
☐ Managed Metadata

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

☒ Yes ☐ No

Enforce unique values:

☐ Yes ☒ No

Maximum number of characters:

Default value:

☒ Text ☐ Calculated Value

[Column Validation](#)

OK Cancel

Multiple Lines of Text Column

1. Click on Create Column from the List ribbon.
2. Enter the column name.
3. Select Multiple lines of text from the type of information in this column is section.
4. Enter a description.
5. Require that this column contains information, yes or no.
6. Enter the number of lines for editing.
7. Specify the type of text to allow, plain is usually the default.
8. Append changes to existing text, the default is no.
9. Click Ok.

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

☐ Single line of text
☒ Multiple lines of text
☐ Choice (menu to choose from)
☐ Number (1, 1.0, 100)
☐ Currency (\$, ¥, €)
☐ Date and Time
☐ Lookup (information already on this site)
☐ Yes/No (check box)
☐ Person or Group
☐ Hyperlink or Picture
☐ Calculated (calculation based on other columns)
☐ Task Outcome
☐ External Data
☐ Managed Metadata

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

☐ Yes ☒ No

Number of lines for editing:

Specify the type of text to allow:

☒ Plain text
☐ Enhanced rich text (Rich text with pictures, tables, and hyperlinks)

Append Changes to Existing Text

☐ Yes ☒ No

Create a Column with Choices

1. Click on Create Column from the List ribbon.
2. Enter the column name.
3. Select Choice from the type of information in this column is section.
4. Enter a description.
5. Require that the column contain information, yes or no.
6. Enforce unique values, default is no.
7. Remove enter choice #1, choice #2 and choice #3 in the Type each choice on a separate line box and enter the three choices the user will choose from.
8. Display choices using Drop-Down Menu, Radio Buttons or Checkboxes (these allow multiple selections).
9. Allow Fill-in choices, this would give the user the ability to fill in choices other than what is available.
10. Enter a choice for the default value.
11. Click Ok.

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Additional Column Settings

Specify detailed options for the type of information you selected.

[Column Validation](#)

Column name:

Position Type

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☒ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ Task Outcome
- ☐ External Data
- ☐ Managed Metadata

Description:

What type of employment is the candidate seeking?

Require that this column contains information:

- ☒ Yes ☐ No

Enforce unique values:

- ☐ Yes ☒ No

Type each choice on a separate line:

Full Time
Part Time
Contract

Display choices using:

- ☒ Drop-Down Menu
- ☐ Radio Buttons
- ☐ Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:

- ☐ Yes ☒ No

Default value:

- ☒ Choice ☐ Calculated Value

Full Time

OK

Cancel

Create a Yes No Column

1. Click on Create Column from the List ribbon.
2. Enter the column name.
3. Select Yes/No (check box) from the type of information in this column is section.
4. Enter a description.
5. Default value set to No so that there is no check in the checkbox. If the user checks the box then Yes will appear in the list. If there is no check in the box, No will appear in the list.
6. Click Ok.

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Additional Column Settings

Specify detailed options for the type of information you selected.

Column name:

Ever Employed by WCU

The type of information in this column is:

☐ Single line of text

☐ Multiple lines of text

☐ Choice (menu to choose from)

☐ Number (1, 1.0, 100)

☐ Currency (\$, ¥, €)

☐ Date and Time

☐ Lookup (information already on this site)

☒ Yes/No (check box)

☐ Person or Group

☐ Hyperlink or Picture

☐ Calculated (calculation based on other columns)

☐ Task Outcome

☐ External Data

☐ Managed Metadata

Description:

Has the candidate been employed by WCU in the past?

Default value:

No

OK

Cancel

Create Columns that use Number Data Types

1. Click on Create Column in the List ribbon.
2. Enter the column name.
3. Select Number in the type of information in this column is section.
4. Enter the description.
5. Require that the column contain information.
6. Enforce unique values, yes or no.
7. Specify a minimum and maximum allowed value.
8. Select the number of decimal places to be displayed.
9. The default value is number.
10. Check off the Show as percentage box if the value should be a percent.
11. Click Ok.

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Additional Column Settings

Specify detailed options for the type of information you selected.

[Column Validation](#)

Column name:

Experience (Years)

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☒ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ Task Outcome
- ☐ External Data
- ☐ Managed Metadata

Description:

The experience in number of years the candidate has in the field of the desired position

Require that this column contains information:

- ☒ Yes ☐ No

Enforce unique values:

- ☐ Yes ☒ No

You can specify a minimum and maximum allowed value:

Min: 2 Max: 50

Number of decimal places:

0

Default value:

- ☒ Number ☐ Calculated Value

☐ Show as percentage (for example, 50%)

OK

Cancel

Create a Column that uses Currency

1. Click on Create Column on the List ribbon.
2. Enter the column name.
3. Select Currency.
4. Enter a description.
5. Require that the column contain information, yes or no.
6. Enforce unique values, yes or no.
7. Specify a minimum and maximum value if needed.
8. Select number of decimal places.
9. Default value is Currency.
10. Select currency format.
11. Click Ok.

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Additional Column Settings

Specify detailed options for the type of information you selected.

[Column Validation](#)

Column name:

Expected Salary

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☒ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ Task Outcome
- ☐ External Data
- ☐ Managed Metadata

Description:

The expected pay for the desired position.

Require that this column contains information:

- ☐ Yes
- ☒ No

Enforce unique values:

- ☐ Yes
- ☒ No

You can specify a minimum and maximum allowed value:

Min: Max:

Number of decimal places:

0

Default value:

- ☒ Currency
- ☐ Calculated Value

Currency format:

\$123,456.00 (United States)

OK

Cancel

Create a Column for Date and Time

1. Click on Create Column on the List Ribbon.
2. Enter the column name.
3. Select Date and Time.
4. Enter a description.
5. Require that the column contain information, yes or no.
6. Enforce unique values, yes or no.
7. Select Date and Time Format.
8. Select Display Format. Standard with display the date as mm/dd/yyyy. Selecting the Friendly format will the display the date as text. For example depending on the date is could be something such as 5 days from now or February 8.
9. Default value; do not enter if you want user to choose the date.
10. Click Ok.

Create a Calculated Column

This type of column uses data from another column and math operators to create a new set of data. In this example we will be calculating a signing bonus.

1. Click on Create Column on the List ribbon.
2. Enter the column name.
3. Select Calculated.
4. Enter a description.
5. Choose the column that the calculation will be based on, in this example we will calculate a signing bonus. The potential employee will receive a \$1000 for each year of experience.
6. Select a column from the Insert Column box; for this example we'll use select Experience (Years).
7. Click, add to formula.
8. To calculate multiplication enter an asterisk * after the column name in the Formula box.
9. Type the number that the field is to be multiplied by after the asterisk; in this example we use 1000. You have created a formula that reads: multiply the number of years in the Experience column with 1000.
10. Select Currency.
11. Select the number of decimal places; for this example we will choose 0.
12. Select the currency format, the default should be U.S. currency.
13. Click Ok.

Name and Type
Type a name for this column, and select the type of information you want to store in the column.

Column name:
Signing Bonus

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☒ Calculated (calculation based on other columns)
- ☐ Task Outcome
- ☐ External Data
- ☐ Managed Metadata

Description:
A signing bonus on total experience in a given career.

Formula:
[Experience (Years)]*1000

Insert Column:
Created
Date Available
Ever Employed by WCU
Expected Salary
Experience (Years)
Full Name
Modified
Phone Number
Position Type

The data type returned from this formula is:

- ☐ Single line of text
- ☐ Number (1, 1.0, 100)
- ☒ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Yes/No

Number of decimal places:
0

Currency format:
\$123,456.00 (United States)

OK Cancel

Create Columns that pull Data from other Sources

This column is good for restricting the data that people can enter into a column. In this demonstration we will create a Submitted by column. This column will contain the name of the employee recommending a candidate for employment.

Create a Column for Name Lookup

1. Click on Create Column on the List ribbon.
2. Enter the column name.
3. Select Person or Group.
4. Enter a description.
5. Allow multiple selections, yes or no. Select no if you don't want more than one person to recommend the same candidate. In other words each potential candidate can be recommended by one employee.
6. Allow selection of; for this example we will select People Only.
7. Choose from: select All Users.
8. Show field; accept the default or select from the drop down menu.
9. Click Ok.

Name and Type
Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☒ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ External Data
- ☐ Task Outcome
- ☐ Managed Metadata

Additional Column Settings
Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
☒ Yes ☐ No

Enforce unique values:
☐ Yes ☒ No

Allow multiple selections:
☐ Yes ☒ No

Allow selection of:
☒ People Only ☐ People and Groups

Choose from:
☒ All Users
☐ SharePoint Group:

Show field:

Create a Lookup Column

Creates a column that reaches out to another list within your SharePoint site. This column is going to pull information from the other list and bring with it another column that we attach from that same list back to the list you are adding the columns to. For this example we are going to add a Lookup column to the Employee Recommendations list pulling information from the Positions list.

1. Click on Create Column on the List ribbon.
2. Enter the column name.
3. Select Lookup.
4. Enter a description.
5. Require that the column contain information, yes or no.
6. Enforce unique values, yes or no.
7. Get information from: here is where you will select which list you will be pulling information from.
8. In this column: select the column that you would like to pull information from.
9. Add a column to show each of these additional fields:
10. Select Enforce relationship behavior, select Restrict delete. By selecting Restrict delete you will prevent users from deleting items that have other items connected to it.

Name and Type
Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☒ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ External Data
- ☐ Task Outcome
- ☐ Managed Metadata

Additional Column Settings
Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
☒ Yes ☐ No

Enforce unique values:
☐ Yes ☒ No

Get information from:

In this column:

☐ Allow multiple values

Add a column to show each of these additional fields:

- ☐ Departments
- ☒ Departments (linked to item)
- ☐ Positions
- ☐ ID
- ☐ Modified
- ☐ Created
- ☐ Version

Relationship
A lookup column establishes a relationship between list items in this list and related items in the target list. Specify the relationship behavior enforced by this lookup column when a list item in the target list is deleted.

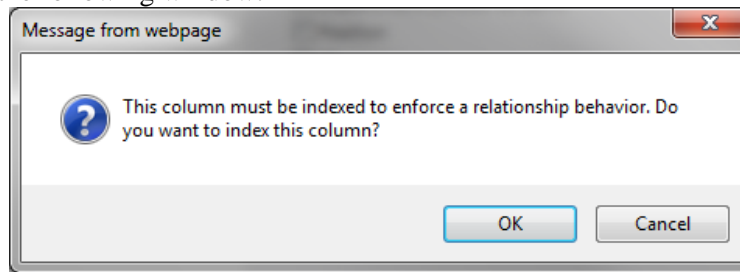
When an item in the target list is deleted, *cascade delete* will delete all related items in this list. *Restrict delete* will prevent the deletion of an item in the target list if it has one or more related items in this list.

☒ Enforce relationship behavior

- ☒ Restrict delete
- ☐ Cascade delete

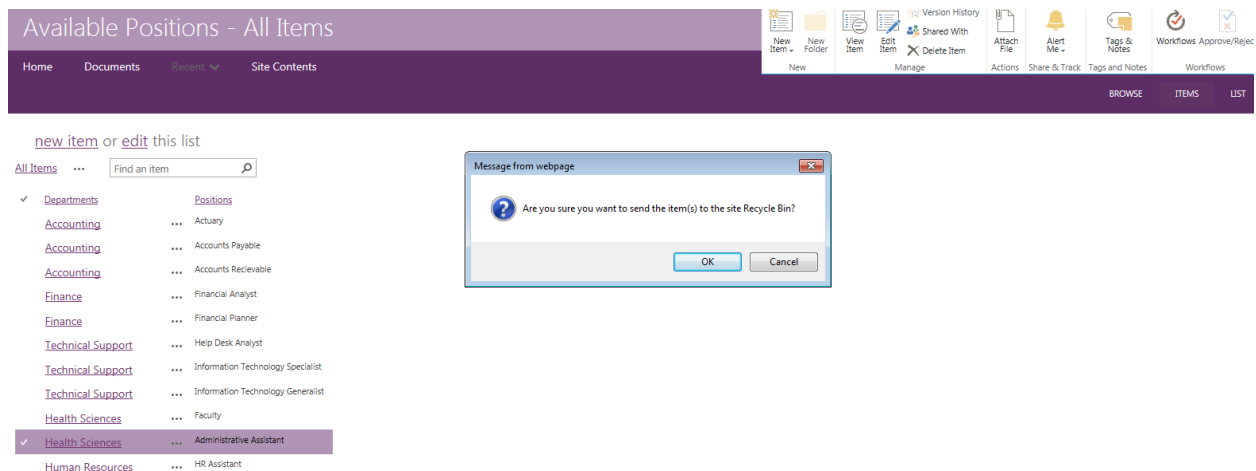
OK Cancel

11. Click Ok.
12. Click Ok to the following window.



How Restrict Delete works: if you try to delete an item inside the Positions list that was added to the Employee Recommendations list here is the error message that will appear:

- The first window that appears is the standard Are you sure you want to delete...



- Click Ok.
- The following window will appear.

The server has encountered the following error(s):
This item cannot be deleted because an item in the "Employee Recommendations" list is related to an item in the "Available Positions" list.

OK

- This tells you that you can't delete the item.

Add information to the Lookup column.

1. In the add item or edit item window scroll down to the Desired Position field and select a position from the drop down list.
2. Click Save.

Full Name *
The full name of the candidate.

Phone Number *
Candidate contact phone number.

Reason for Potential Hire
Why do you think this person is a good candidate for employment?

Position Type *
What type of employment is the candidate seeking?

Ever Employed by WCU ☐
Has the candidate been employed by WCU in the past?

Experience (Years) *
The experience in number of years the candidate has in the field of the desired position

Expected Salary
The expected pay for the desired position.

Date Available
When can the candidate begin?

Submitted By *
Name of employee making this recommendation

Desired Position *
and the department.

Created at 1/8/2016 12:00 PM
Last modified at 1/13/2016 12:00 PM

WCU
WEST CHESTER
UNIVERSITY

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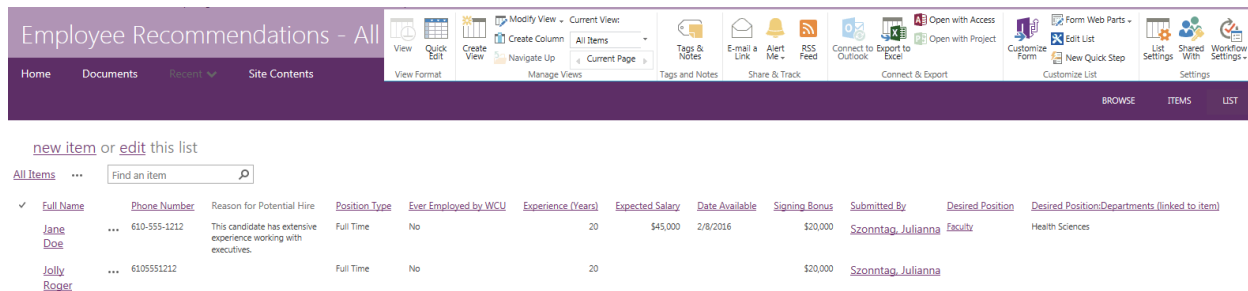
Below is an example of how the Lookup columns appear in the list. The Lookup column, Desired Position pulled the department information from the Positions list and placed it in the Desired Position Department column.

Home Documents Recent Site Contents											
BROWSE ITEMS LIST											
new item or edit this list											
All Items	Find an item										
Full Name	Phone Number	Reason for Potential Hire	Position Type	Ever Employed by WCU	Experience (Years)	Expected Salary	Date Available	Signing Bonus	Submitted By	Desired Position	Desired Position/Departments (linked to item)
Jane Doe	610-555-1212	This candidate has extensive experience working with executives.	Full Time	No	20	\$45,000	2/8/2016	\$20,000	Szonttag, Julianna	Faculty	Health Sciences
Jolly Roger	6105551212		Full Time	No	20			\$20,000	Szonttag, Julianna		

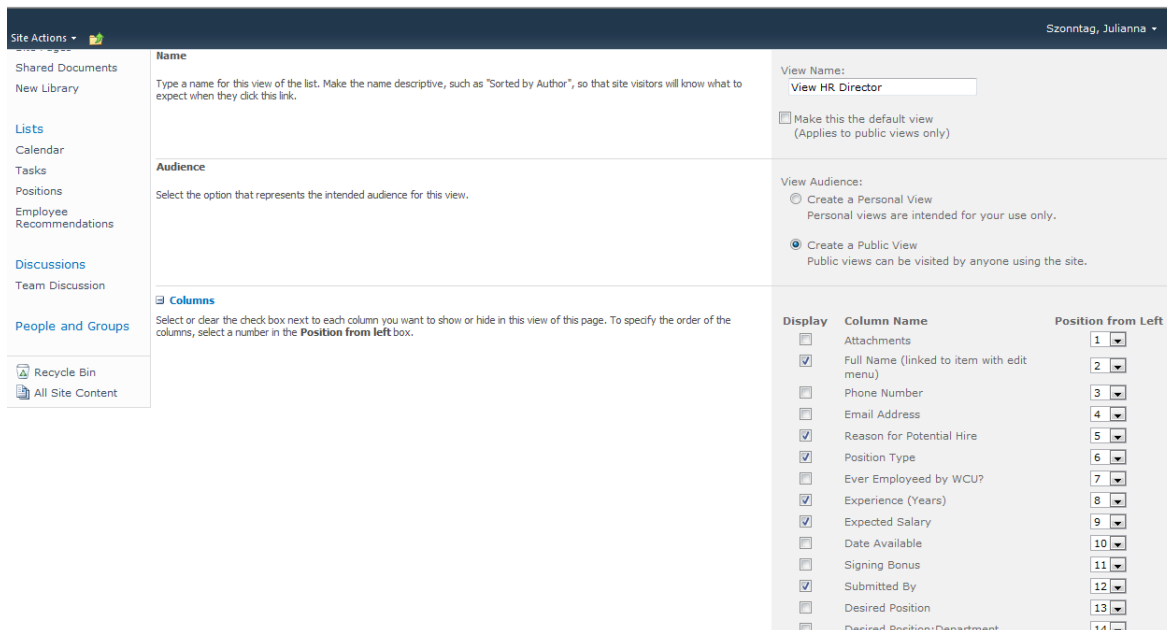
Create a View in a List

We are going to create a view for the director of Human Resources.

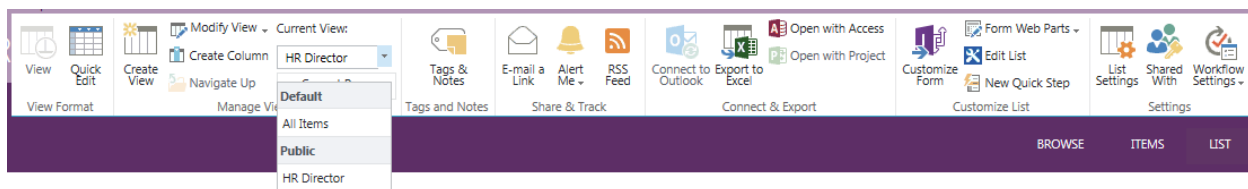
1. Click on the List tab and select Create View.



2. Select Standard View from the Choose a view type window.
3. Give the view a name. We will call this View HR Director.
4. Do not select Make this the default view unless this will become the new view.
5. Select Create a Public View.
6. Uncheck the columns that you don't want to have appear in the view.
7. Scroll down to the bottom of the page and click Ok.



8. To change the view for the list:
 - Open the list and click on the down arrow next to View HR Director in the navigation bar and select All Items.



Change the order of data entry for a List item

1. Click on the List ribbon and select List Settings.
2. Scroll down and select Column ordering located under Columns.

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type
Full Name	Single line of text
Phone Number	Single line of text
Reason for Potential Hire	Multiple lines of text
Position Type	Choice
Ever Employed by WCU	Yes/No
Experience (Years)	Number
Expected Salary	Currency
Date Available	Date and Time
Signing Bonus	Calculated (calculation based on other columns)
Submitted By	Person or Group
Desired Position	Lookup
Desired Position:Departments (linked to item)	Lookup
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

☐ [Create column](#)

☐ [Add from existing site columns](#)

☒ [Column ordering](#)

☐ [Indexed columns](#)

3. Change the order of the fields by changing the number. When finished click Ok.

Change Column Ordering

Home Documents Recent Site Contents

Field Order

Choose the order of the fields by selecting a number for each field under "Position from Top".

Field Name	Position from Top
Full Name	1
Phone Number	2
Reason for Potential Hire	3
Position Type	4
Ever Employed by WCU	5
Experience (Years)	6
Expected Salary	7
Date Available	8
Signing Bonus	9
Submitted By	10
Desired Position	11

OK Cancel

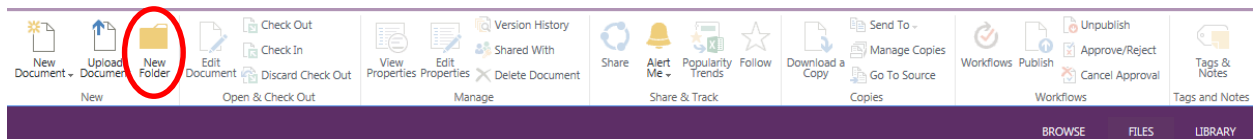
Working with Libraries

Creating Folders

Folders can be created 2 ways; by using the ribbon or thorough the Open with Explorer option.

Using the ribbon to create a folder.

1. Click on the Files tab on the ribbon.
2. Click on New Folder.



3. Enter the name of the folder in the New Folder window.
4. Click Save.

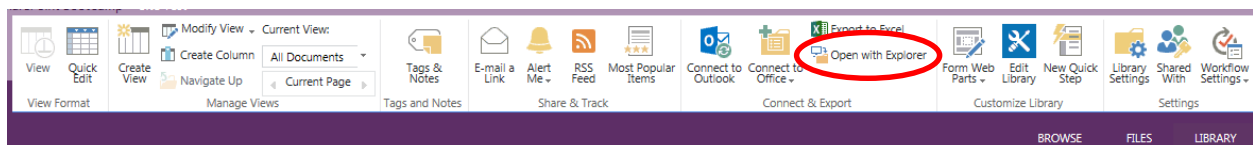


5. The folder appears at the top of the list in the library.

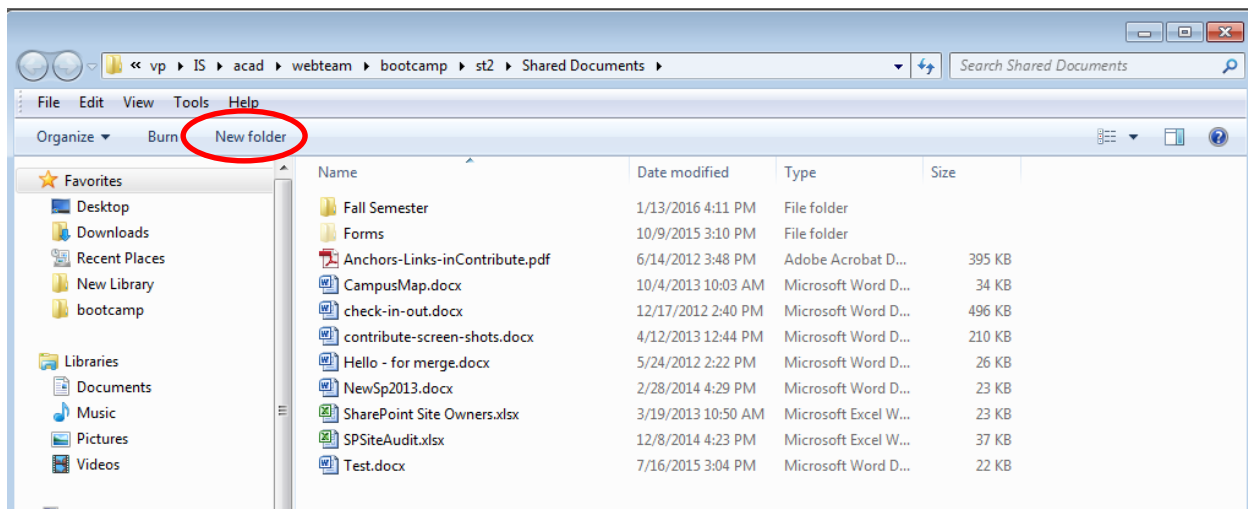


Using Open with Explorer to create a folder.

1. Click on Open with Explorer on the Library ribbon.



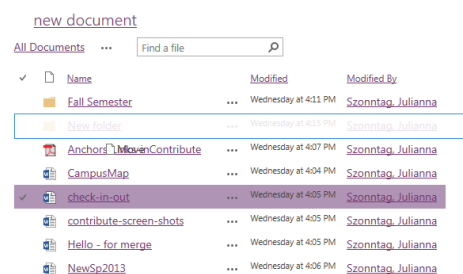
2. If a windows security login window appears login with your WCU network username and password.
3. Click on New folder located on the toolbar. The new folder will appear in the list.
4. Name the folder.



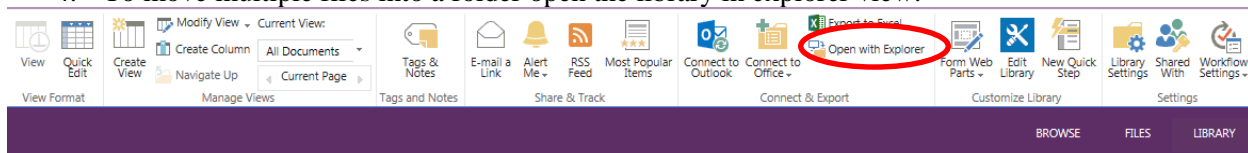
Moving documents into Folders

Once you have created a folder how do you move the files into it? In SharePoint 2013 you can now click and drag a file into the folder while in the library. Or you can move files using the explorer view.

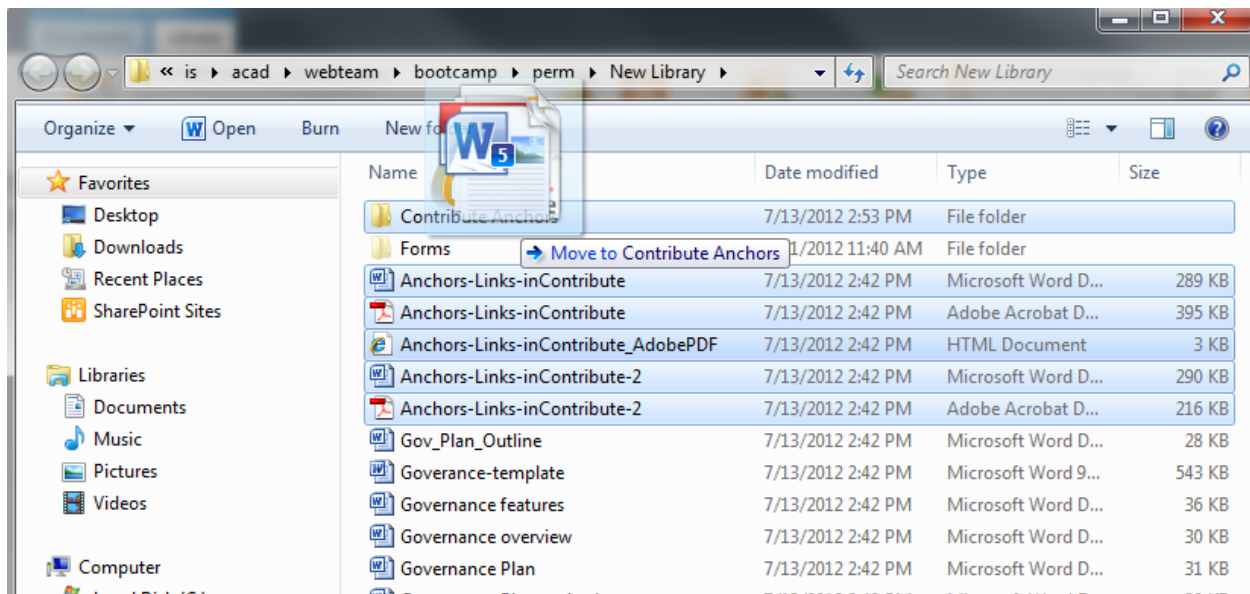
1. Open the library.
2. Click and drag a selected file into the folder.
3. You can only drag one file at a time using this method.



4. To move multiple files into a folder open the library in explorer view.



5. A windows security login window will open. Login with your WCU network username and password.
6. Select the file or files that you would like to store in the folder and drag them into the folder.



Adding Columns

The definition of a column is a vertical set of data that spans down the library of files.

1. Click on the Library ribbon and select Library Settings.
2. Scroll down to the Columns section and click on Add from existing site columns.

[Document](#)

[Add from existing site content types](#)
[Change new button order and default content type](#)

Columns

A column stores information about each document in the document library. Because this document library allows multiple content types, some column settings, such as whether information is required or optional for a column, are now specified by the content type of the document. The following columns are currently available in this document library:

Column (click to edit)	Type	Used in
Created	Date and Time	Document
Modified	Date and Time	Document
Title	Single line of text	Document
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

[Create new column](#)
[Add from existing site columns](#)
[Remove columns](#)

3. Select the column you would like to add to the library, click the ADD button.
4. Click Ok.
5. In the example below the Assigned To column was selected from the list.

Select Columns
Select which site columns to add to this list.

Select site columns from:
All Groups

Available site columns:

- Actual Work
- Address
- Aliases
- Anniversary
- Append-Only Comments
- Article Date
- Assistant's Name
- Assistant's Phone

Description:
None

Group: Core Task and Issue Columns

Columns to add:
Assigned To

Options

☒ Add to all content types
☒ Add to default view

OK Cancel

6. The column has been added.

[new document](#) or drag files here

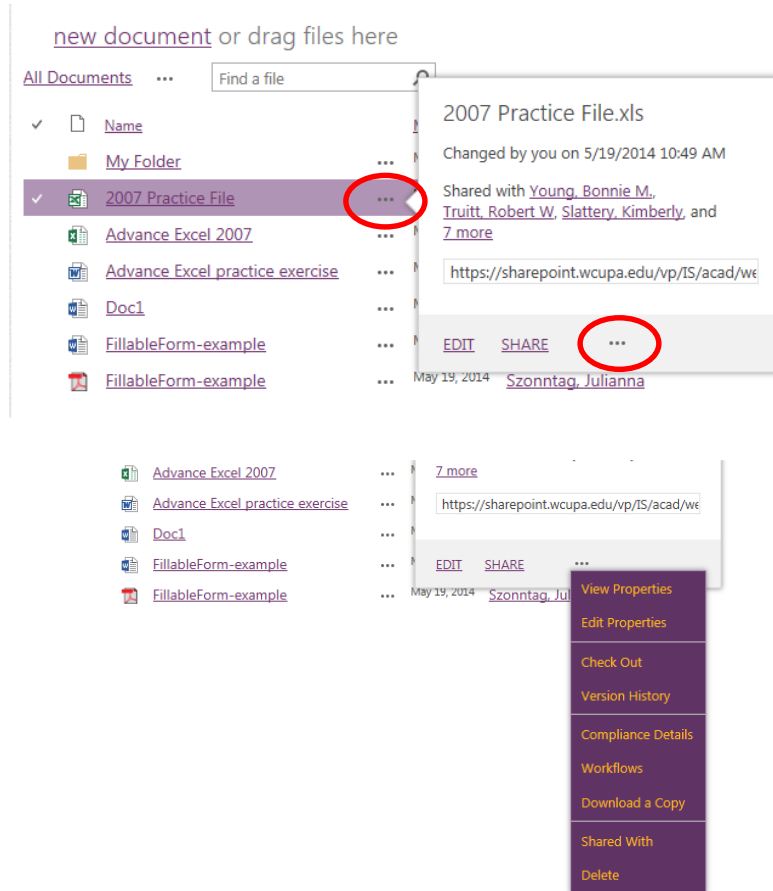
[All Documents](#) ... Find a file

✓	Name	Modified	Modified By	Assigned To
	My Folder	...	May 19, 2014	Szonntag, Julianna
	2007 Practice File	...	May 19, 2014	Szonntag, Julianna
	Advance Excel 2007	...	May 19, 2014	Szonntag, Julianna
	Advance Excel practice exercise	...	May 19, 2014	Szonntag, Julianna
	Doc1	...	March 8	Szonntag, Julianna
	FillableForm-example	...	May 19, 2014	Szonntag, Julianna
	FillableForm-example	...	May 19, 2014	Szonntag, Julianna

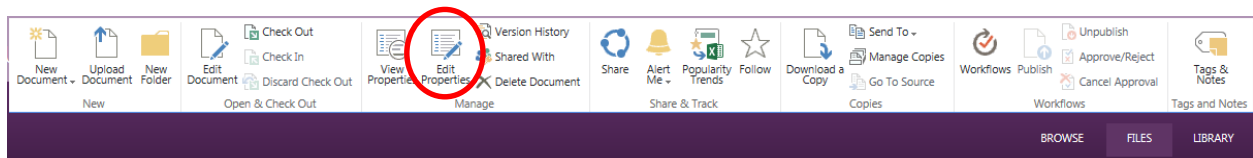
Adding data to the New Columns

You can add data to columns in a library two ways.

1. Hover over an item in the library and click on the ellipsis menu (...) to the right of the document name.
2. Click on the ellipsis menu in the pop-out window to expand the menu.



3. Or select an item by clicking on it.



4. Click on Edit Properties on the Files ribbon.
5. The Edit dialog box opens.
6. A name can be added to the Assigned To field by typing the person's username or clicking on the address book and selecting it from there. If you type the person's name make sure to click on the check name icon to verify that the name is correct.
7. Add the due date. You can use the date picker to select the date.
8. Click Save when finished.

EDIT

Save Cancel Paste Copy Delete Item

Commit Clipboard Actions

Name *

Title

Assigned To

Version: 1.0
 Created at 5/19/2014 10:47 AM by [Szonntag, Julianna](#)
 Last modified at 5/19/2014 10:54 AM by [Szonntag, Julianna](#)

Save Cancel

Sorting Columns

Sort the Assigned to column.

1. Click on the drop down arrow next to Assigned To
2. Select A on Top or Z on Top depending on how you want to sort the column.
3. You can also filter the column by selecting a person's name from the drop down list.

Information Services > Academic Computing Services > Web Team > SharePoint BootCamp

Juli's Documents - All Documents

Home Sites Pictures Libraries Lists Recent People and Groups New Items Test Site Contents

new document or drag files here

All Documents Find a file

Name	Modified	Modified By	Assigned To
My Folder	May 19, 2014	Szonntag, Julianna	A on Top
2007 Practice File	About a minute ago	Szonntag, Julianna	Z on Top
Advance Excel 2007	About a minute ago	Szonntag, Julianna	
Advance Excel practice exercise	About a minute ago	Szonntag, Julianna	
Doc1	About a minute ago	Szonntag, Julianna	
FillableForm-example	A few seconds ago	Szonntag, Julianna	
FillableForm-example	A few seconds ago	Szonntag, Julianna	

Drop down menu for Assigned To:

- A on Top
- Z on Top
- Clear Filters from Assigned To
- (Empty)
- Stettner, Eric M.
- Swift, Daniel P.
- Szonntag, Julianna
- Williams, Kristin L.

4. Column filtered by username.

Information Services > Academic Computing Services > Web Team > SharePoint BootCamp

Juli's Documents - All Documents

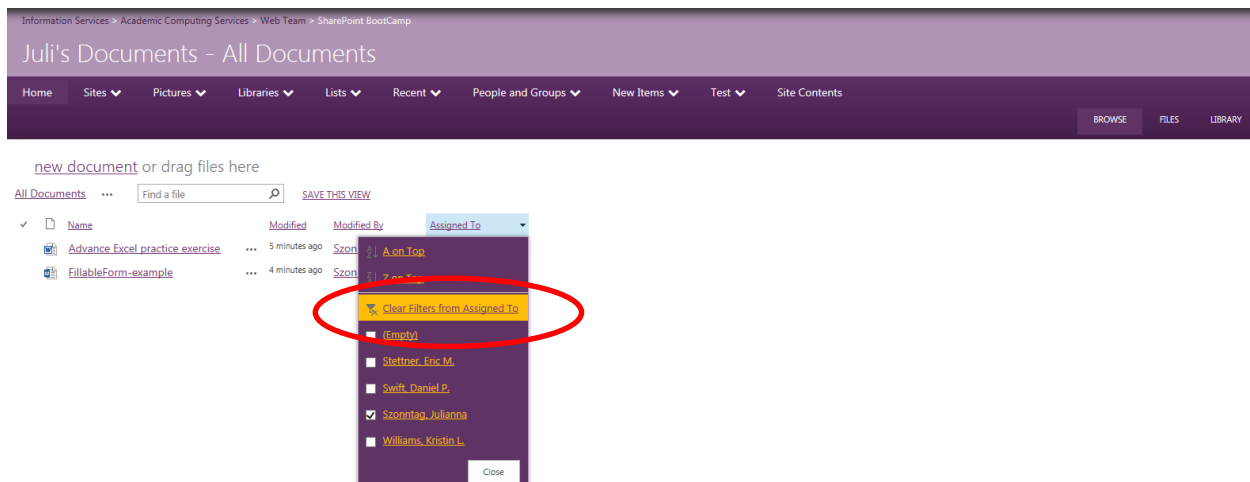
Home Sites Pictures Libraries Lists Recent People and Groups New Items Test Site Contents

new document or drag files here

All Documents Find a file SAVE THIS VIEW

Name	Modified	Modified By	Assigned To
Advance Excel practice exercise	3 minutes ago	Szonntag, Julianna	Szonntag, Julianna
FillableForm-example	About a minute ago	Szonntag, Julianna	Szonntag, Julianna

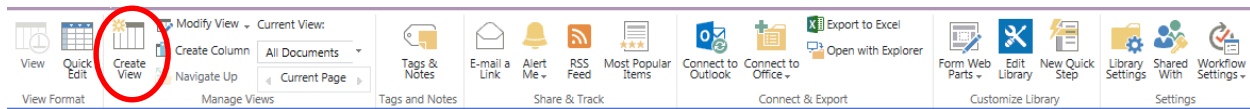
5. To return the view to show all documents click on the down arrow next to Assigned To and click on Clear Filter from Assigned To.



Creating a View in a Library

A view is a predefined query that returns files based on criteria that you set. We will demonstrate how to create a view for a specific date.

1. Click on the Library ribbon and select Create View.



2. Under Choose a view format select Standard View.
3. Give the view a name.
4. You can make this a default view by checking the box next to Make this the default view.
5. Select Create a Public View.
6. Scroll down to Sort and select Assigned To under the First sort by the column.
7. Scroll down to the Filter section.
8. Select Show items only when the following is true.
9. Select Due Date from the drop down list under Show the items when column.
10. In the box under is equal to, type in the specific date to be displayed in the view.
11. Click Ok.

Information Services > Academic Computing Services > Web Team > SharePoint BootCamp

Create View

HomeSites ▼Pictures ▼Libraries ▼Lists ▼Recent ▼People and Groups ▼New Items ▼Test ▼Site Contents

OK

Cancel

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:

Sample view

☐ 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 checked="" type="checkbox"/>	Assigned To	5
<input checked="" type="checkbox"/>	Due Date	6
<input type="checkbox"/>	App Created By	7
<input type="checkbox"/>	App Modified By	8
<input type="checkbox"/>	Check In Comment	9
<input type="checkbox"/>	Checked Out To	10
<input type="checkbox"/>	Content Type	11
<input type="checkbox"/>	Copy Source	12
<input type="checkbox"/>	Created	13
<input type="checkbox"/>	Created By	14
<input type="checkbox"/>	Document ID (linked to document)	15
<input type="checkbox"/>	Edit (link to edit item)	16
<input type="checkbox"/>	File Size	17
<input type="checkbox"/>	Folder Child Count	18
<input type="checkbox"/>	ID	19
<input type="checkbox"/>	Item Child Count	20
<input type="checkbox"/>	Name (for use in forms)	21
<input type="checkbox"/>	Name (linked to document)	22
<input type="checkbox"/>	Title	23
<input type="checkbox"/>	Version	24

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:

Assigned To

☒ Show items in ascending order

(A, B, C, or 1, 2, 3)

☐ Show items in descending order

(C, B, A, or 3, 2, 1)

24

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.](#)

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).

☐ Show all items in this view

☒ Show items only when the following is true:

Show the items when column

Due Date

is equal to

4/6/2016

☐ And ☒ Or

When column

None

is equal to

[Show More Columns...](#)

Tabular View

Group By

Totals

Style

Folders

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)

Number of items to display in list view web part for this view:

3

Field to display in mobile list simple view:

Name (linked to document with edit menu)

OK

Cancel

The new view

Information Services > Academic Computing Services > Web Team > SharePoint BootCamp

Juli's Documents - Sample view

Home Sites Pictures Libraries Lists Recent People and Groups New Items Test Site Contents

BROWSE FILES LIBRARY

[new document](#) or drag files here

All Documents Sample view Find a file

Name	Modified	Modified By	Assigned To	Due Date
FillableForm-example	13 minutes ago	Szonntag, Julianna	Swift, Daniel P.	4/6/2016
2007 Practice File	15 minutes ago	Szonntag, Julianna	Swift, Daniel P.	4/6/2016
Advance Excel 2007	15 minutes ago	Szonntag, Julianna	Williams, Kristin L.	4/6/2016

Changing Views

1. Click on the Library ribbon.
2. Click on the down arrow next to the view located in the Mange Views group.
3. Select a different view.

Information Services > Academic Computing Services > Web Team > SharePoint BootCamp

Juli's Documents - Sample view

Home Sites Pictures Libraries Lists Recent People and Groups New Items Test Site Contents

BROWSE FILES LIBRARY

[new document](#) or drag files here

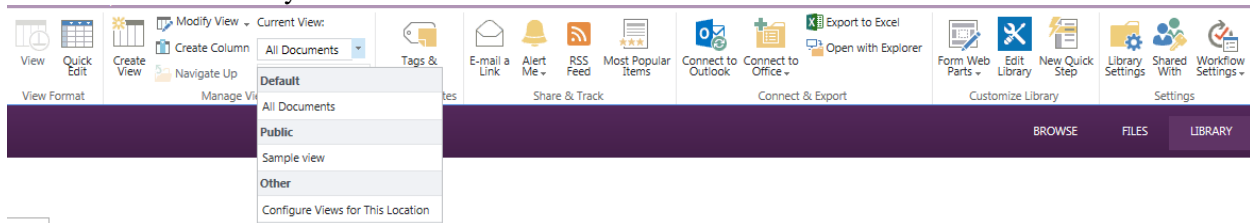
All Documents Sample view Find a file

Name	Modified	Modified By	Assigned To	Due Date
FillableForm-example	13 minutes ago	Szonntag, Julianna	Swift, Daniel P.	4/6/2016
2007 Practice File	15 minutes ago	Szonntag, Julianna	Swift, Daniel P.	4/6/2016
Advance Excel 2007	15 minutes ago	Szonntag, Julianna	Williams, Kristin L.	4/6/2016

Using Folders and Views Together

When views are created for libraries that contain folders the view does not automatically include the files in the folders as part of the view. To include files located in folders the view needs to be edited.

1. Click on Library Settings located on the Library ribbon.
2. Click on Modify View.



3. Scroll down to the Views section and click on the view to be edited.
4. The Edit View page opens.
5. Scroll down to the Folders section and expand Folders.
6. Show items inside folders will only show the files that adhere to the criteria in the current folder. To change this select Show all items without folders.
7. Show all items without folders will show all files that adhere to the criteria regardless of which folder it is in.
8. Click Ok.

A screenshot of the 'Edit View' dialog box. The 'Folders' section is expanded, showing 'Specify whether to navigate through folders to view items, or to view all items at once.' Below this, the 'Item Limit' and 'Mobile' sections are visible. The 'Mobile' section has a 'Delete' button at the bottom, which is circled in red.

Delete Views

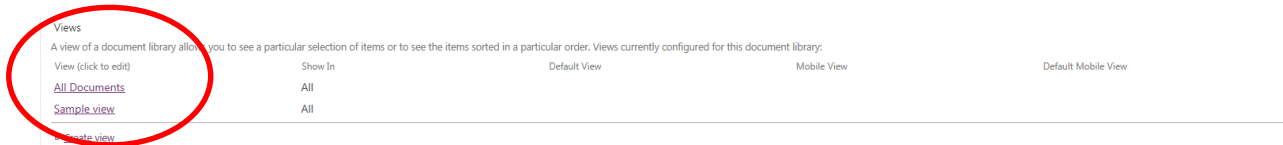
1. Click on the Library ribbon and select Modify View.
2. Scroll down to the bottom of the page.
3. Click Delete.
4. Click Ok to the delete warning box.

A screenshot of the 'Delete View' dialog box. The 'Delete' button is circled in red. The dialog box contains the following text: 'Delete', 'OK', and 'Cancel'. The 'Delete' button is highlighted with a red circle.

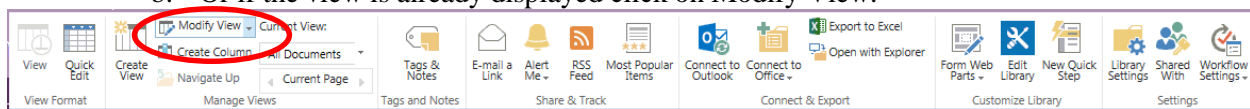
Group by View

Views can be created by grouping similar items in a column. We will demonstrate by grouping the Assigned To column.

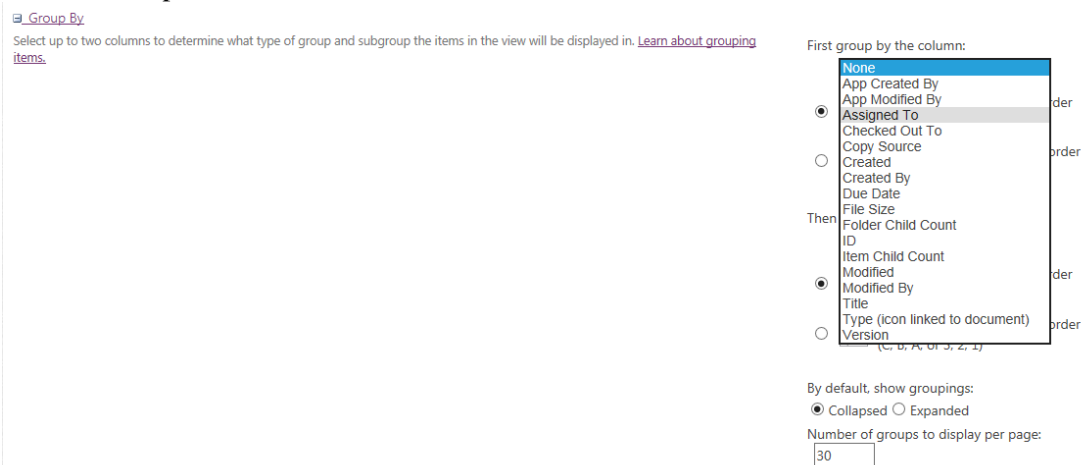
1. Click on the Library ribbon and select Library Settings.
2. You can access the view in 2 ways:
 - a. From the Library Settings page scroll down to the Views section and click on the view that you would like to edit.



- b. Or if the view is already displayed click on Modify View.

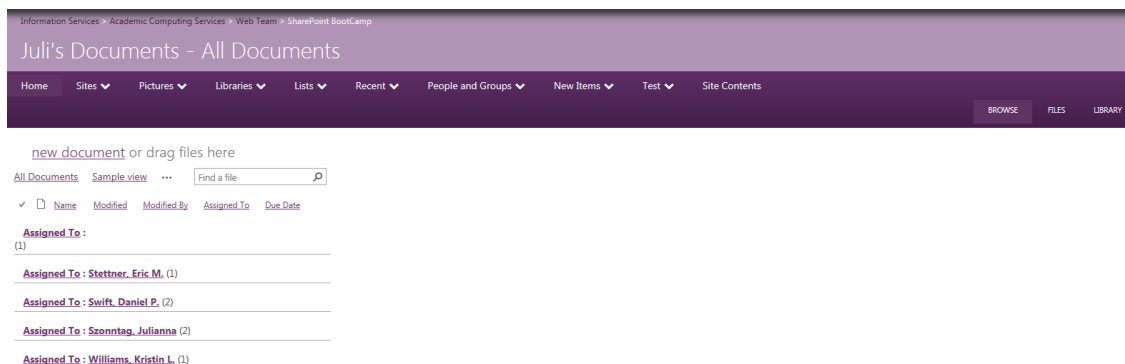


3. Scroll down to the Group By option and expand it.
4. You have the option to group by two columns (this example shows grouping by one column).
5. Select the column that you would like the grouping to start with from the First group by the column drop down list.



6. Click Ok at the bottom of the page.

This example shows only one column grouping.



- To group by a second column go to the Group By section on the Modify View page and select a column from the Then group by the column drop down list.

[Group By](#)

Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in. [Learn about grouping items.](#)

First group by the column:

Assigned To

- ☒ Show groups in ascending order (A, B, C, or 1, 2, 3)
- ☐ Show groups in descending order (C, B, A, or 3, 2, 1)

Then group by the column:

None
App Created By
App Modified By
Assigned To
Checked Out To
Copy Source
Created
Created By
Due Date
File Size
Folder Child Count
ID
Item Child Count
Modified
Modified By
Title
Type (icon linked to document)
Version

[Totals](#)

[Style](#)

- Click Ok.

This example shows 2 column grouping.

- To expand or collapse a group click on the column name.

Information Services > Academic Computing Services > Web Team > SharePoint BootCamp

Juli's Documents - All Documents

Home Sites Pictures Libraries Lists Recent People and Groups New Items Test Site Contents

BROWSE FILES LIBRARY

new document or drag files here

All Documents Sample view Find a file

Name Modified Modified By Assigned To Due Date

Assigned To: (1)

Assigned To: Stettner, Eric M. (1)

Due Date: 4/13/2016 (1)

Assigned To: Swift, Daniel P. (2)

Due Date: 4/6/2016 (2)

Assigned To: Szonntag, Julianna (2)

Due Date: 4/3/2016 (1)

Due Date: 5/16/2016 (1)

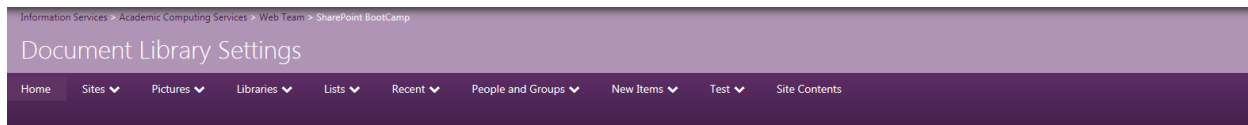
Assigned To: Williams, Kristin L. (1)

Version History

SharePoint gives you the ability to track version history. When you create a Library you have the option to turn on versioning. If you did not enable that option when you created the library you can turn it on at a later time.

Turn on Version History

- Click on the Library ribbon and select Library Settings.
- Under General Settings click on Versioning settings.



3. In the Document Version History section select Create major versions.
4. Check the Optionally limit the number of versions to retain box and enter a number.
5. If you would like documents to be required to be checked out before they can be edited select Yes in the Require Check Out section.
6. Click Ok.

Content Approval
Specify whether new items or changes to existing items should remain in a draft state until they have been approved. [Learn about requiring approval.](#)

Require content approval for submitted items?
☐ Yes ☒ No

Document Version History
Specify whether a version is created each time you edit a file in this document library. [Learn about versions.](#)

Create a version each time you edit a file in this document library?
☐ No versioning
☒ Create major versions
 Example: 1, 2, 3, 4
☐ Create major and minor (draft) versions
 Example: 1.0, 1.1, 1.2, 2.0

Optionally limit the number of versions to retain:
☒ Keep the following number of major versions:

☐ Keep drafts for the following number of major versions:

Draft Item Security
Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. [Learn about specifying who can view and edit drafts.](#)

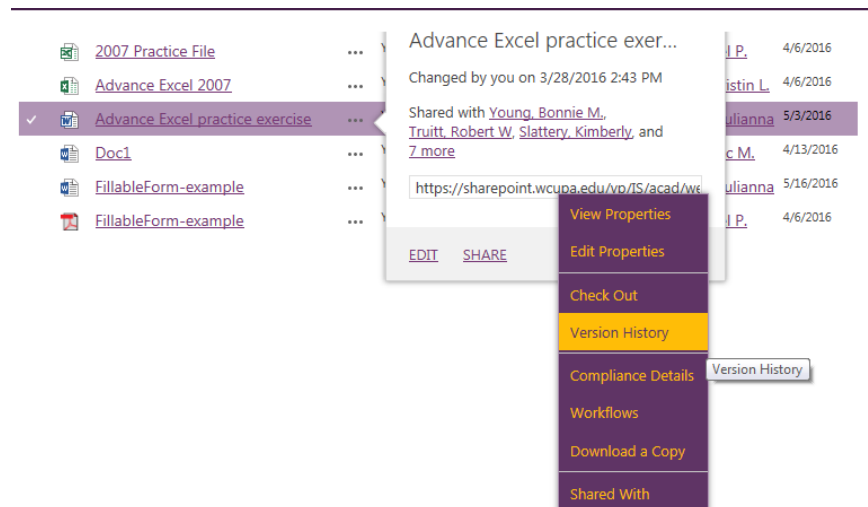
Who should see draft items in this document library?
☒ Any user who can read items
☐ Only users who can edit items
☐ Only users who can approve items (and the author of the item)

Require Check Out
Specify whether users must check out documents before making changes in this document library. [Learn about requiring check out.](#)

Require documents to be checked out before they can be edited?
☐ Yes ☒ No

Access the Version History for a file

1. To access the version history of a file hover over the file, click on the ellipsis menu and select Version History.



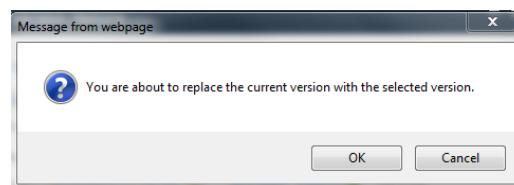
- This document has five versions. Mouse over the date of the version that you would like to restore and select Restore from the drop down menu.

[Delete All Versions](#)

No.	Modified	Modified By	Size	Comments
3.0	3/28/2016 2:43 PM	Szonntag, Julianna	37 KB	
	Due Date 5/3/2016			
2.0	3/28/2016 2:32 PM	Szonntag, Julianna	37 KB	
	Assigned To Szonntag, Julianna			
1.0		Szonntag, Julianna	35.5 KB	

View
 Restore
 Delete

- A warning message appears indicating that you are about to replace the current version with the selected version, click Ok.



- A new version has been created. Click on the date of the new version to open the document.

[Delete All Versions](#)

No.	Modified	Modified By	Size	Comments
4.0	3/29/2016 9:50 AM	Szonntag, Julianna	37 KB	
	Due Date			
3.0	3/28/2016 2:43 PM	Szonntag, Julianna	37 KB	
	Due Date 5/3/2016			
2.0	3/28/2016 2:32 PM	Szonntag, Julianna	37 KB	
	Assigned To Szonntag, Julianna			
1.0	5/19/2014 10:54 AM	Szonntag, Julianna	35.5 KB	

5. You can delete individual versions or delete all the versions at once. Mouse over the date of the document and select Delete from the drop down list or click on Delete All Versions at the top of the list.

List and Library Permissions

In some cases, your site might contain content only meant for certain users or groups. For example, if you have a list on your site that contains sensitive data, you would need to restrict who could see it.

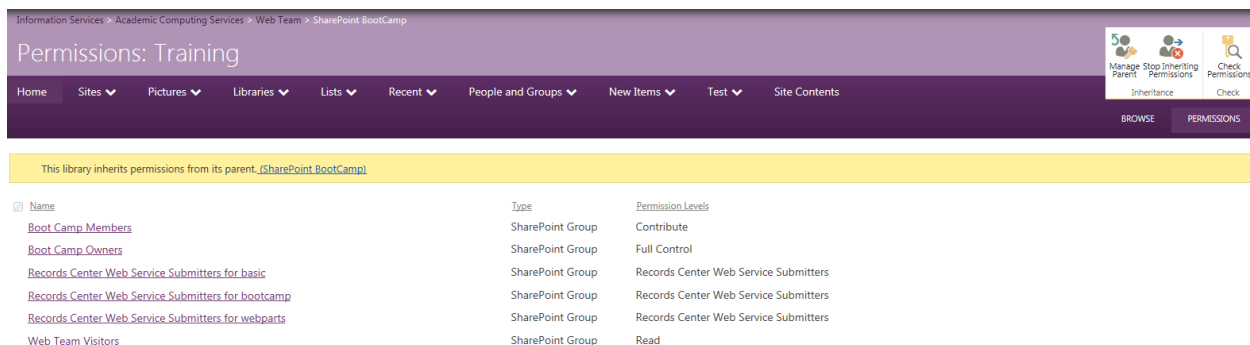
Restrict access to a List

You can follow the same steps for a site, library, or individual item, working from their respective permissions pages.

Break inheritance from the parent.

1. Access your site in the browser and open the list to which you want to restrict access.
2. On the ribbon, click the **List Settings** button. In a document library, **Library Settings** will appear instead.
3. On the Settings page, under Permissions and Management, click **Permissions for this list** (or **Permissions for this document library** in a library).

The permissions page for the list will open with a status bar across the top. The status bar explains that the list inherits permissions from its parent site, with the parent site named. (Note that this status bar may also show that people are waiting for your approval to access the list.)

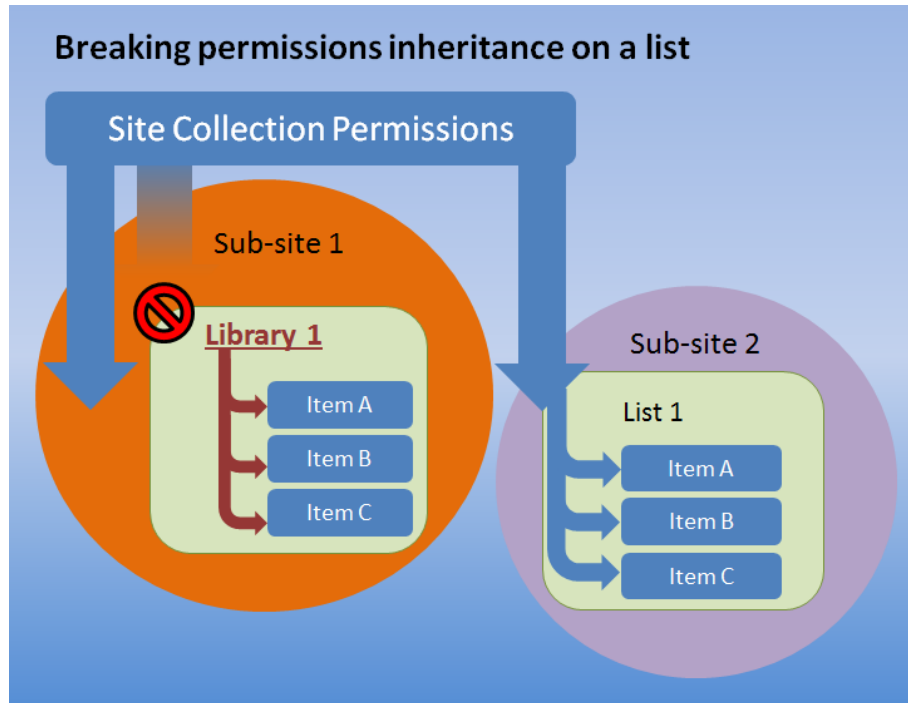


Name	Type	Permission Levels
Boot Camp Members	SharePoint Group	Contribute
Boot Camp Owners	SharePoint Group	Full Control
Records Center Web Service Submitters for basic	SharePoint Group	Records Center Web Service Submitters
Records Center Web Service Submitters for bootcamp	SharePoint Group	Records Center Web Service Submitters
Records Center Web Service Submitters for webparts	SharePoint Group	Records Center Web Service Submitters
Web Team Visitors	SharePoint Group	Read

5. To break permissions inheritance from the parent, click the **Stop Inheriting Permissions** button in the ribbon.
6. Click **OK** if you're prompted with a message stating that you're about to create unique permissions for the list. The message explains that changes made to the parent site's permissions will no longer affect this list.

Now the list is disconnected from the parent site. Here are a few important things to note:

- The list still has the same permission settings that it did before. But now, instead of inheriting permissions from the parent, it has its own copy of the parent's permissions.
- Changes that you make to the permissions settings for the parent site will not be inherited by this list.
- Changes to the permissions of this list will flow downstream to any item in the list that is not uniquely secured.
- The status bar for the list now reports "This list has unique permissions" and the ribbon buttons have changed to include "Delete unique permissions", "Grant permissions", "Edit User Permissions", and "Remove User Permissions".



Library 1 has broken permissions inheritance from the site collection root above it. Sub-site 1 still inherits all the users and groups from the site collection root, but Library 1 has become a parent to all the items inside its scope (its documents). When permissions inheritance is first broken, this library will have permissions identical to the site collection root. However, the Site Owner, or anyone with sufficient rights on the list, will be able to add and remove users and groups as needed. Library 1 is uniquely secured and will require separate permissions management.

Remove groups or users you don't want

7. Access your site in the browser and open the list to which you want to restrict access.
8. On the ribbon, click the **List Settings** button. In a document library, **Library Settings** will appear instead.
9. On the Settings page, under Permissions and Management, click **Permissions for this list** (or **Permissions for this document library** in a library).
10. In the **Name** section of the permissions page, select the checkboxes for the groups or users who should not have access to this list.
11. Click **Remove User Permissions**.

The permissions page updates to show that the group or user no longer has permissions to the list.

Information Services > Academic Computing Services > Web Team > SharePoint BootCamp

Permissions: Training

Home | Sites | Pictures | Libraries | Lists | Recent | People and Groups | New Items | Test | Site Contents

[Delete unique permissions](#) | [Grant Permissions](#) | [Edit User Permissions](#) | [Remove User Permissions](#) | [Check permissions](#)

BROWSE | PERMISSIONS

This library has unique permissions.

Name	Type	Permission Levels
<input type="checkbox"/> Boot_Camp_Members	SharePoint Group	Contribute
<input type="checkbox"/> Boot_Camp_Owners	SharePoint Group	Full Control
<input type="checkbox"/> Records_Center_Web_Service_Submitters_for_basic	SharePoint Group	Records Center Web Service Submitters
<input type="checkbox"/> Records_Center_Web_Service_Submitters_for_bootcamp	SharePoint Group	Records Center Web Service Submitters
<input type="checkbox"/> Records_Center_Web_Service_Submitters_for_webparts	SharePoint Group	Records Center Web Service Submitters
<input checked="" type="checkbox"/> Web_Team_Visitors	SharePoint Group	Read

Grant access to groups or individuals

1. While on the permissions page for the list, on the **Edit** tab, click the **Grant Permissions** button.
2. Type the name of the group or the individual you want to grant access to in the **Select Users** dialog box.
3. Click on Show Options to show permission levels.

×

Invite people to 'Edit'

Williams, Kristin L. x Information Services Visitors x |

Include a personal message with this invitation (Optional).

SHOW OPTIONS

Share Cancel

4. Click on the drop down arrow in the Select a permission level box to view all of the choices.
5. Select the permission level.
6. Uncheck the Send an email invitation if you do not wish to send an email.
7. Click Share.

×

Invite people to 'Edit'

Williams, Kristin L. x Information Services Visitors x |

Include a personal message with this invitation (Optional).

HIDE OPTIONS

☒ Send an email invitation

Full Control
Design
Edit
Contribute
Read
Approve
Manage Hierarchy
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Reconfigure a list to inherit permissions

When you break permissions inheritance between a site, folder, list, library, list item, or document and its parent, you can restore inheritance at any time.

1. Open the list for which you want to restore permissions inheritance.
2. On the ribbon, click the **List Settings** button. In a document library this will say **Library Settings**.
3. On the Settings page, under Permissions and Management, click **Permissions for this list** (or **Permissions for this document library** in a library).
4. On the list or library permission ribbon, click **Delete unique permissions**.
5. Click **OK** if prompted with a message stating that you are about to inherit permissions from the parent web site. Notice that any custom permissions will be lost when you complete this action.

The status bar for the list now reports “This list inherits permissions from its parent.” The name of the parent appears beside the updated status.

Notes: