

Training Manual

Manage

Document

Libraries

SharePoint 2013 – GTA Platform

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Support: For further assistance, fill out a Support Request at <http://portal.georgia.gov/support>

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1.0 Overview

SharePoint 2013 is a centralized document repository for use on the intranet. The site pages are consistent in look and feel throughout the site. SharePoint 2013 can also be used as a content management tool that will allow users to edit and manage their intranet site.

This manual will help users to understand and use some of the SharePoint 2013 Advanced Concepts that require use of **Adding an App** and **Ribbons**.

1.1 Intended Audience

The intended audience for this course is GTA content managers and project managers who have a basic understanding of SharePoint 2013. Mastery of the content in SharePoint 2013 Basic Concepts will provide a sufficient foundation for Manage Document Libraries.

1.2 System Requirements

For maximum performance, the recommended browser is Internet Explorer 11. There is limited support for the Google Chrome browser.

If your computer does not have one of the recommended browsers, please contact the Help Desk for assistance

1.3 Terminology

Content Item – a piece of content that is used in your agency’s site and includes a title and other customized fields.

Content Manager – a user responsible for a single site including its lists, libraries, content and any sub-sites of the site, i.e. a user with full control rights to a single site. Also called the Content Owner.

Content Type – columns associated with content: metadata, properties, template, workflows and information management policies

Gear – an icon  located in the upper right corner at the top of the SharePoint page next to your name that is used to access settings within SharePoint.

Gold bar – top navigation on the master page that contains tabs linking the user to other pages in the site collection.

Landing page – the web page that is displayed when a visitor clicks on a tab.

Master page – a web page in a site that defines the look, feel and standard behavior of all other web pages in the site.

Metadata – terms used to classify items; also referred to as ‘site columns.’

Quick Launch – links on the left of the page that remains permanently in the layout.

Ribbon – a central place at the top of a SharePoint page to find groups of commands for interacting with SharePoint.

SharePoint Site Administrator – the user responsible for the entire site collection who has access to all site collection features included in site settings, i.e. the person responsible for GTA’s entire site collection.

Support Services – the GTA team that manages the GTA help desk for SharePoint 2013 issues.

Support Services is located at:
<http://support.georgia.gov>

URL – a link that is formatted with the web path for accessing a web page.

e.g. GTA’s SharePoint 2013 production site URL is: <https://mygta.ga.gov/>

2.0 Edit Tools

SharePoint 2013 introduces some new tools that have expansive functionality:

- Gear
- Ribbons

You’ll become more familiar with these tools as you continue through the course.

Note: Some functionality on the gear is also available on the ribbon.

2.1 Gear

A powerful tool that is used in SharePoint 2013 is the ‘gear’ . When you click the gear , a drop down will display with various options, e.g. Edit page, Add an app, etc. Depending on your permissions, the drop down will only display options you are granted permission to use.

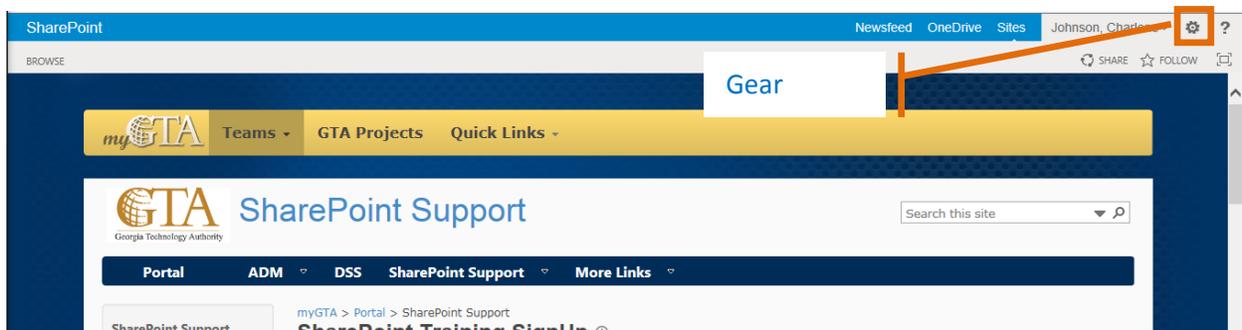


Figure 1 The gear  when granted edit or app permission

Note: The gear  will not display if the user only has read permission.

2.2 Library Ribbon

The Library Ribbon contains additional content controls that will allow you to edit and customize the view of the library.

To view the Library Ribbon,

1. Navigate to the library you want to customize
2. SharePoint will display the content control, if you have sufficient permission
3. Select the **LIBRARY** tab on the content control
4. SharePoint will display the Library ribbon.

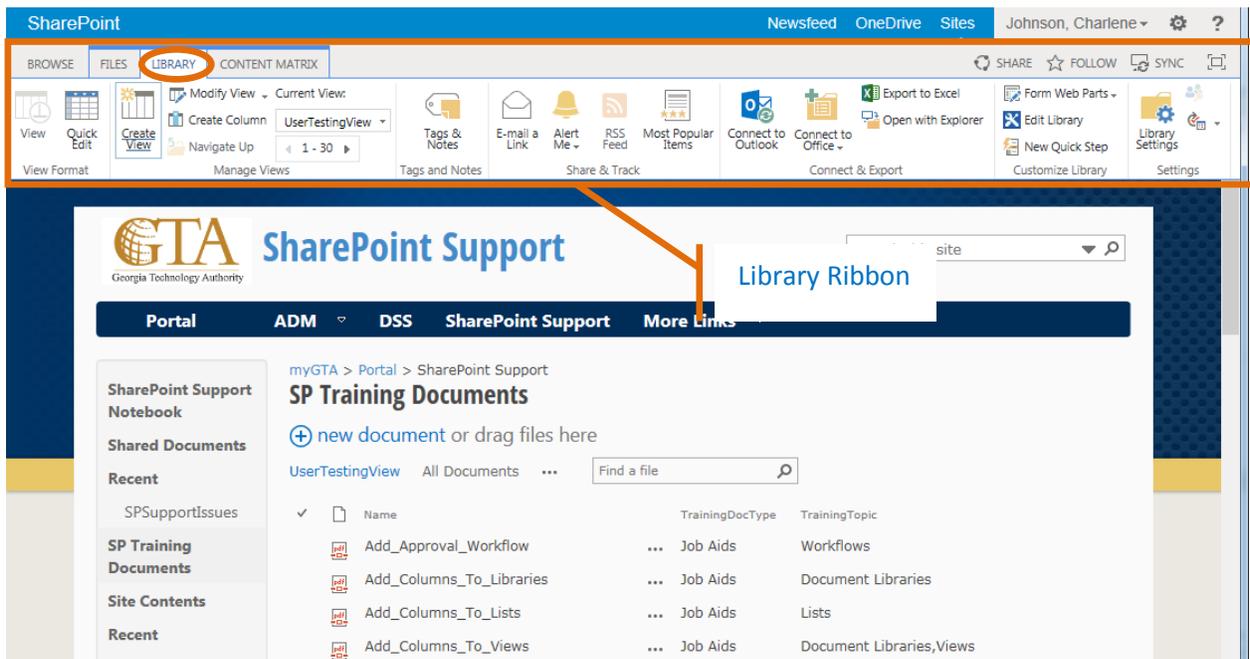


Figure 2 Library Ribbon when you select Library on the control tab

3.0 Library Settings

You can always navigate to a library using Site Content which is the container for all site items. You can also navigate to a library using Quick Launch which is a shortcut that can be set up for easy access to a library.

After you navigate to the library, you can use **Library Settings** to control the library structure, permissions and display.

3.1 Display Settings Using Quick Launch

To navigate to Library Settings using **Quick launch**,

1. Click on the library name using **Quick Launch**

Revised 03/03/2014

2. Click the **LIBRARY** control tab

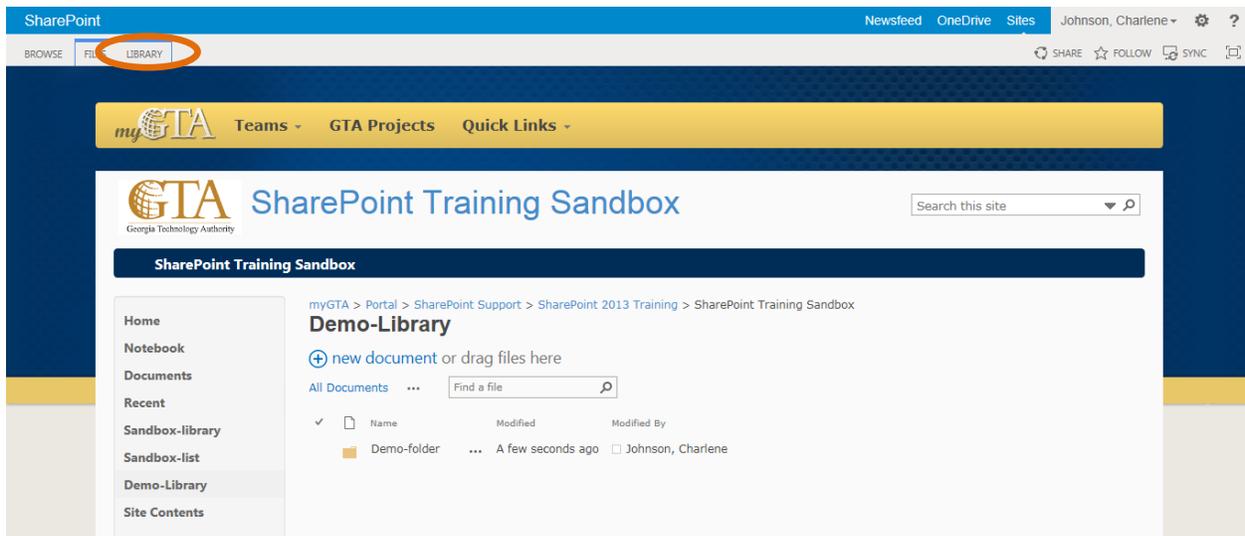


Figure 3 LIBRARY control tab when you are on the library page

3. SharePoint will display the library ribbon

4. On the ribbon, click **Library Settings**

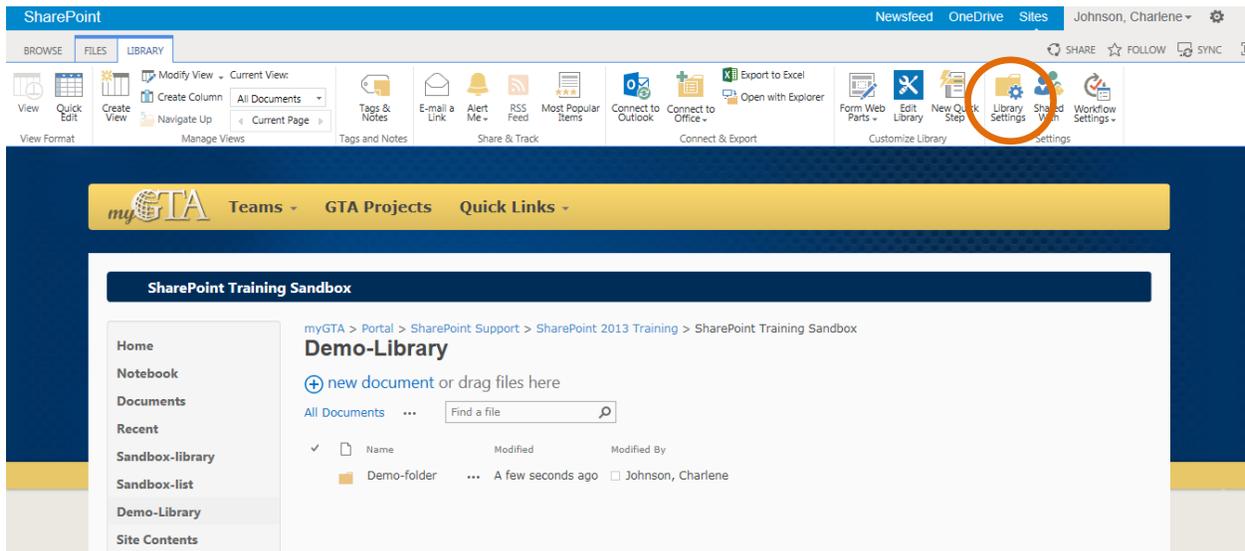


Figure 4 Library Settings when the library ribbon is displayed

5. SharePoint will display the **Settings** page for the library

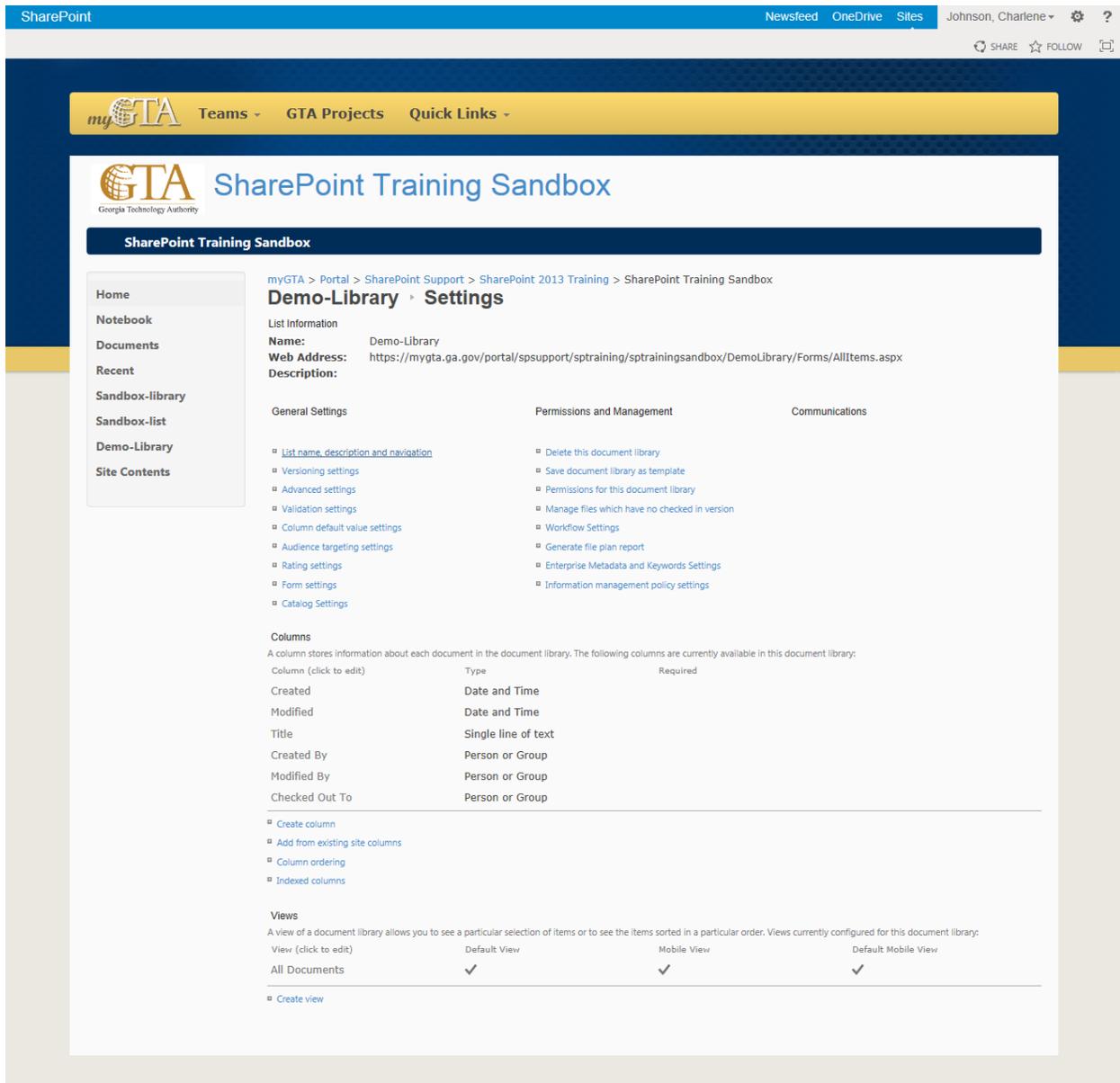


Figure 5 Library Settings page when you select Library Settings from the ribbon

3.2 Display Settings Using Site Contents

To navigate to Library Settings using **Site Contents**,

1. Navigate to the page with the **Site Contents**
2. Click **Site Contents**
3. SharePoint will display one or more pages containing a tile for each of the items in the site content
4. Scroll through the **Site Contents** and find the library you want to use

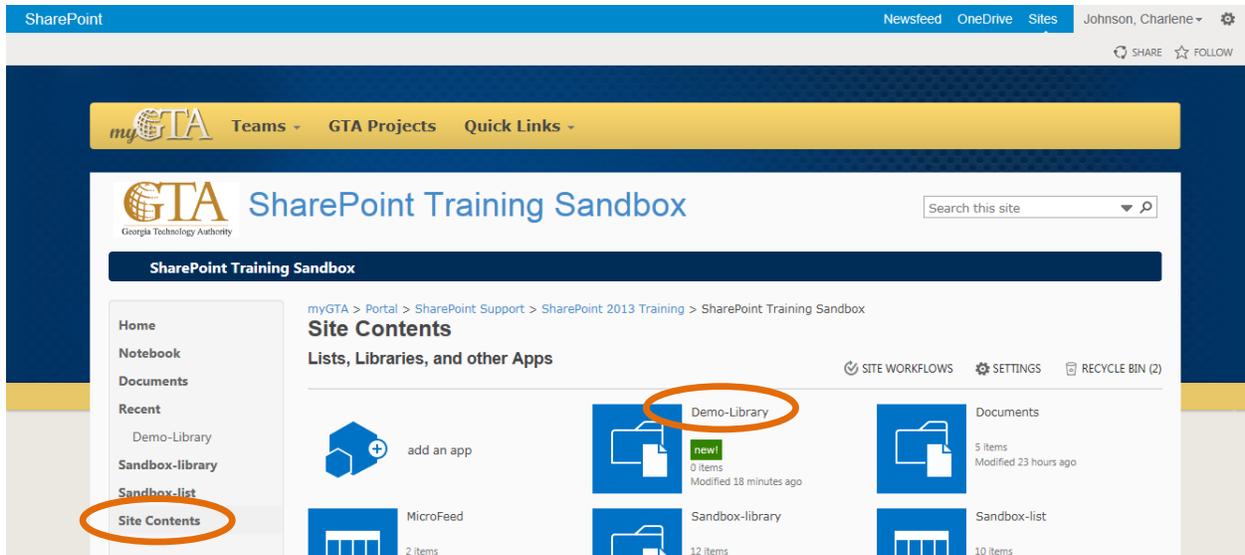


Figure 6 The library name when you display Site Contents

5. Hover over the document name until the **ellipses** display under the library name and then click the **ellipses**

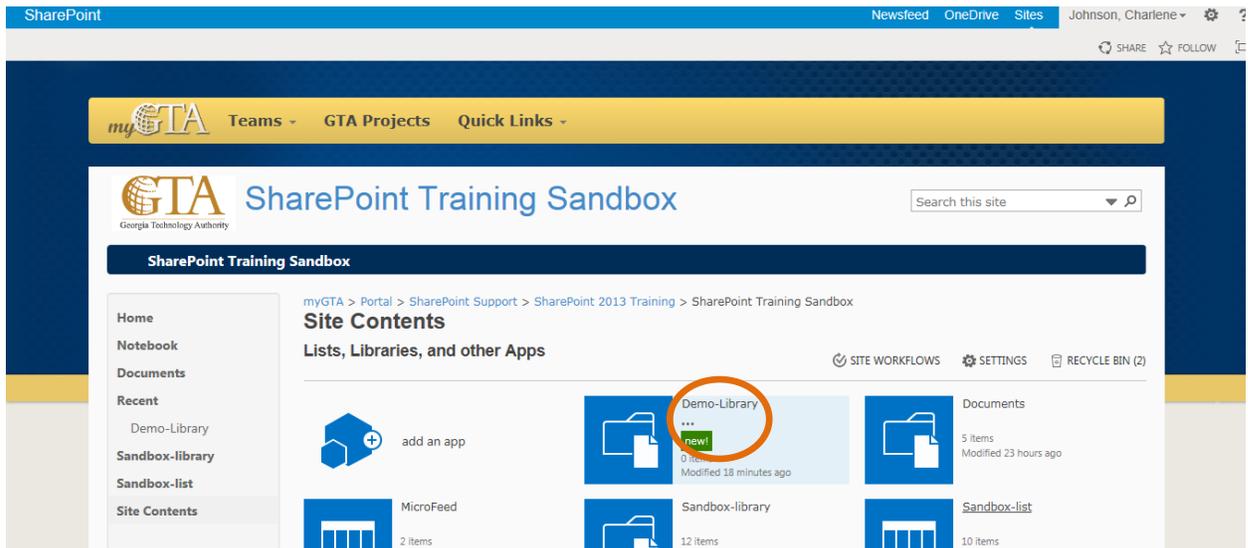


Figure 7 The ellipses when you hover over the library name

6. SharePoint will display a pop up
7. On the pop up, click **Settings**

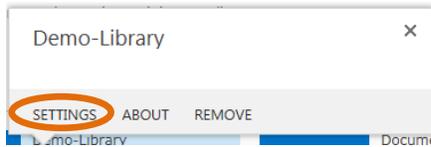


Figure 8 Settings option when the pop up is displayed

8. SharePoint will display the **Settings** page for the library

4.0 Apply Your Knowledge Exercises: Library Settings

The **Library Settings** for any SharePoint library can be displayed.

To view the **Library Settings**,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. On the Quick Launch, select **Documents** library
3. On the control tabs above the gold bar, select **LIBRARY**
4. SharePoint will display the **Library Ribbon**
5. On the **Library Ribbon**, click **Library Settings**
6. SharePoint will display the **Settings**

5.0 New Library

A library is a container for documents or pictures. Depending on your permissions, you can add, rename or delete a library.

5.1 Create a new Library

When you want to create a library, you will need to make sure you have permission to **Add an App**. After navigating to the page where you want to add the library, you will create the library by adding the appropriate app.

To add a library,

1. Navigate to the page where you want to add a library
2. Click the gear  and a drop down will display
3. On the drop down, click **Add an app**

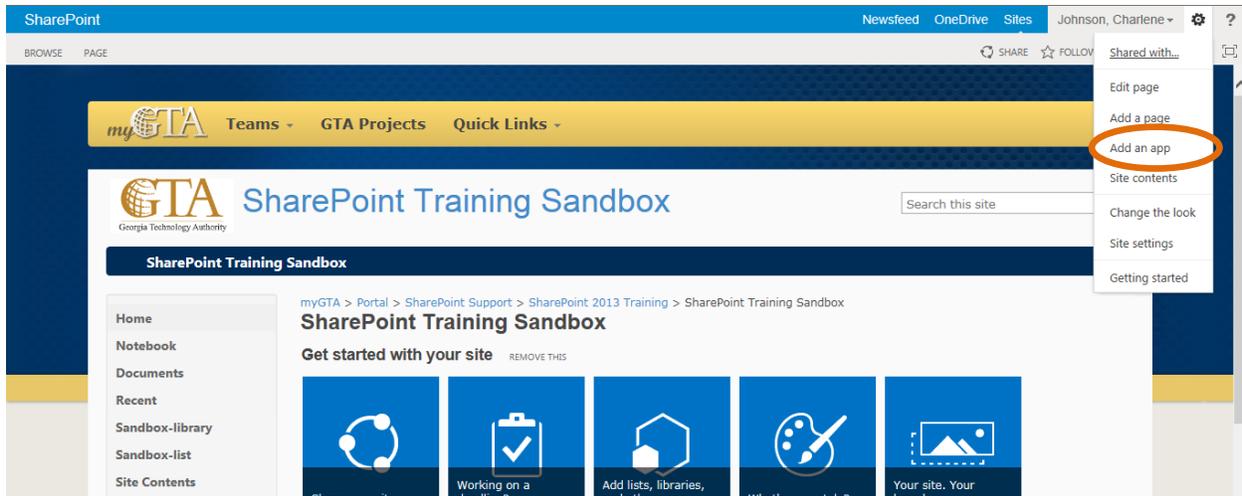


Figure 9 Add an app when you click the gear

4. SharePoint will display one or more pages that contain app tiles.
5. Scroll through the app tiles until you find the **Document Library** app and then click on it.

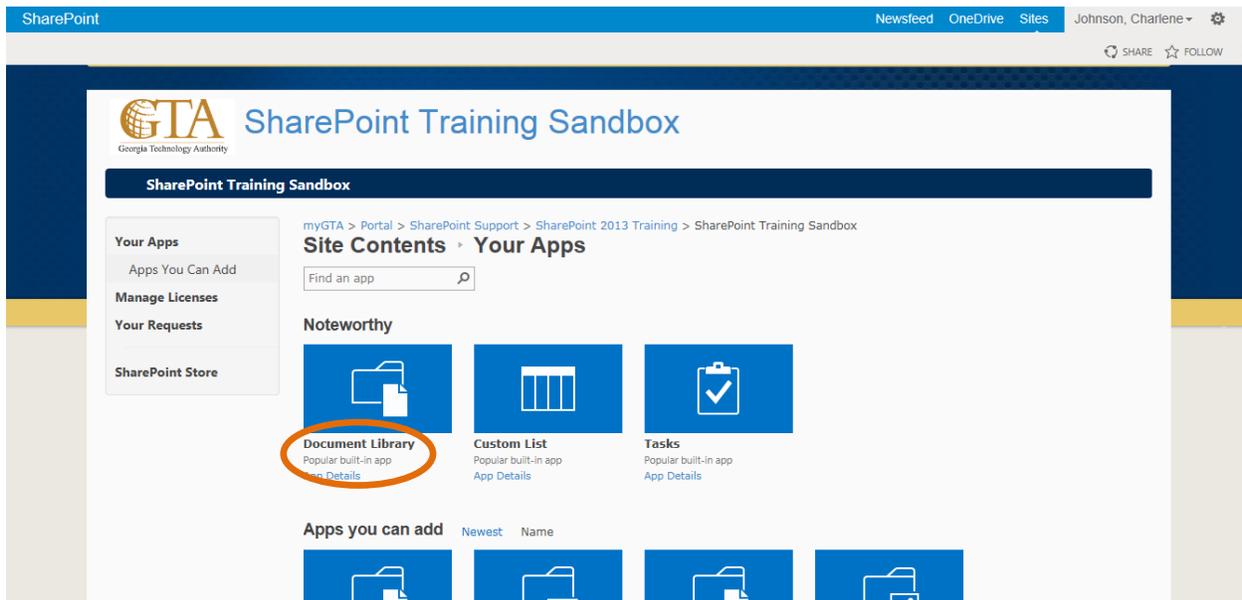


Figure 10 Document Library app when you scroll through the app tiles

6. SharePoint will display the **Adding Document Library** pop up
7. Enter the **Name** for the library and click **Create**

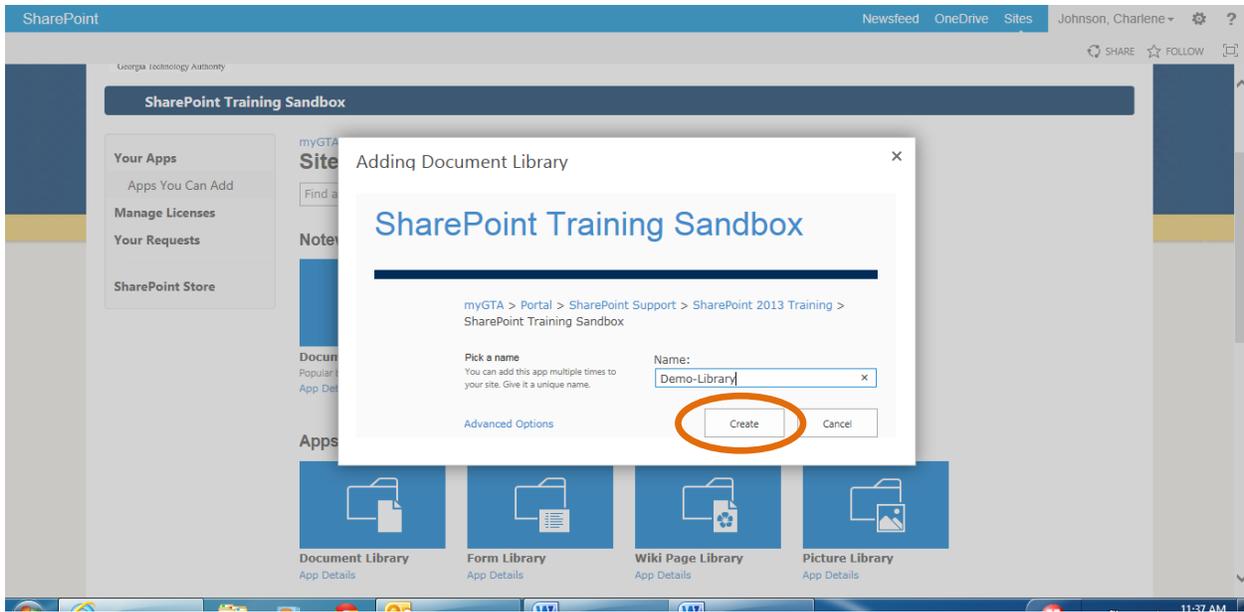


Figure 11 Adding Document Library pop up when you click on the Document Library tile

8. SharePoint will create the library and store it in the **Site Contents**

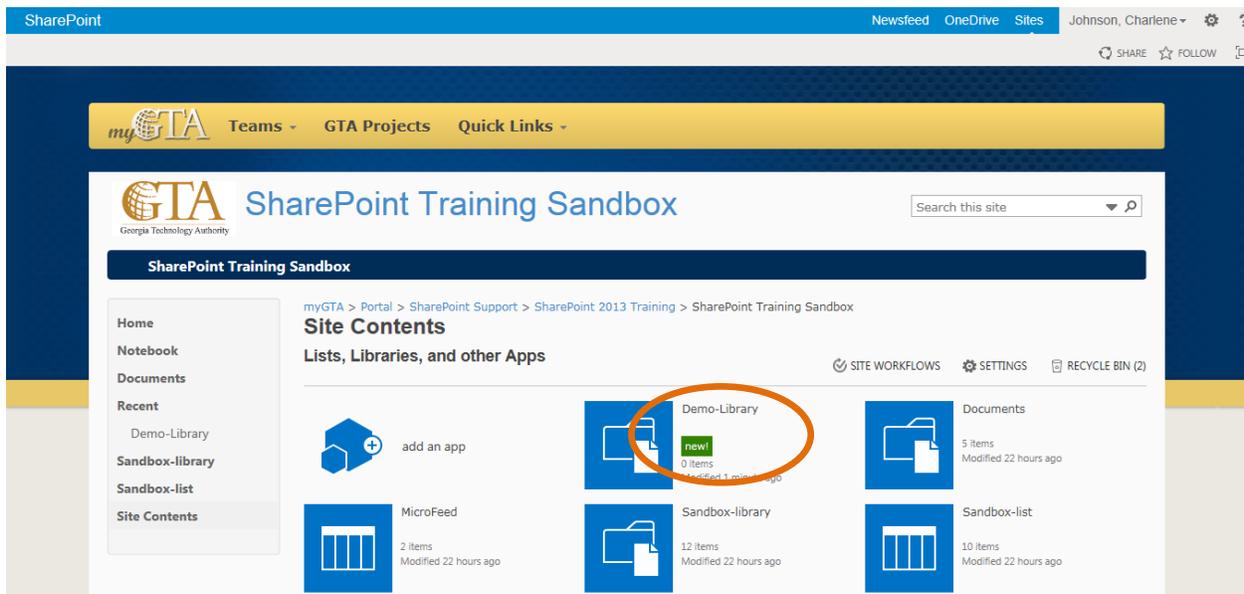


Figure 12 New Document Library in Site Contents when you created it

6.0 Apply Your Knowledge Exercises: New Library

To create a new library,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click the gear  and a drop down is displayed
3. On the drop down, click **Add an app and** SharePoint will display one or more pages that contain app tiles.
4. Scroll through the app tiles until you find the **Document Library** app and then click on it.
5. SharePoint will display the **Adding Document Library** pop up
6. Enter the **Name** for the library and click **Create**
7. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
8. Click **Site Contents**
9. Scroll through the tiles to find your new library

7.0 General Settings

General Settings are used to control the structure of a library. Using General Settings, you can manage the library name, description or navigation

7.1 Display General Settings

After a library is created, you can display or change the **General Settings** including:

- The library name
- The library description
- Quick Launch navigation

To display the **General Settings** for a library,

1. Display the library ribbon and click **Library Settings**
2. SharePoint will display the **Settings** page for the library
3. On the **Settings** page, click **List name, description and navigation**

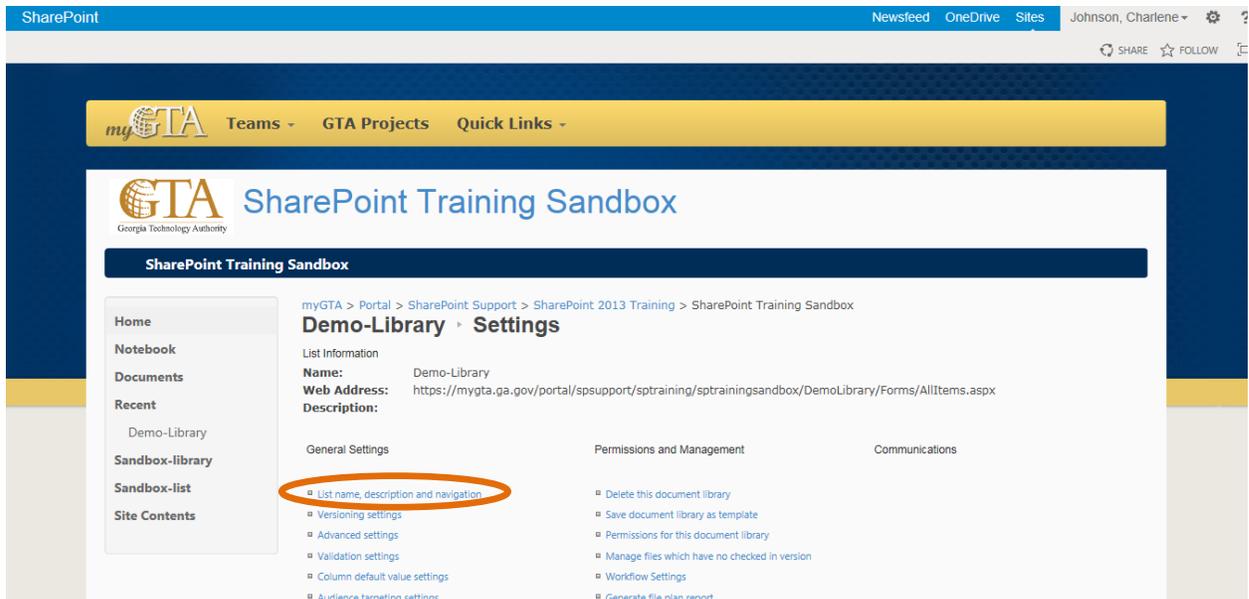


Figure 13 List name, description and navigation option when the Settings page is displayed

4. SharePoint will display the **General Settings** for the library

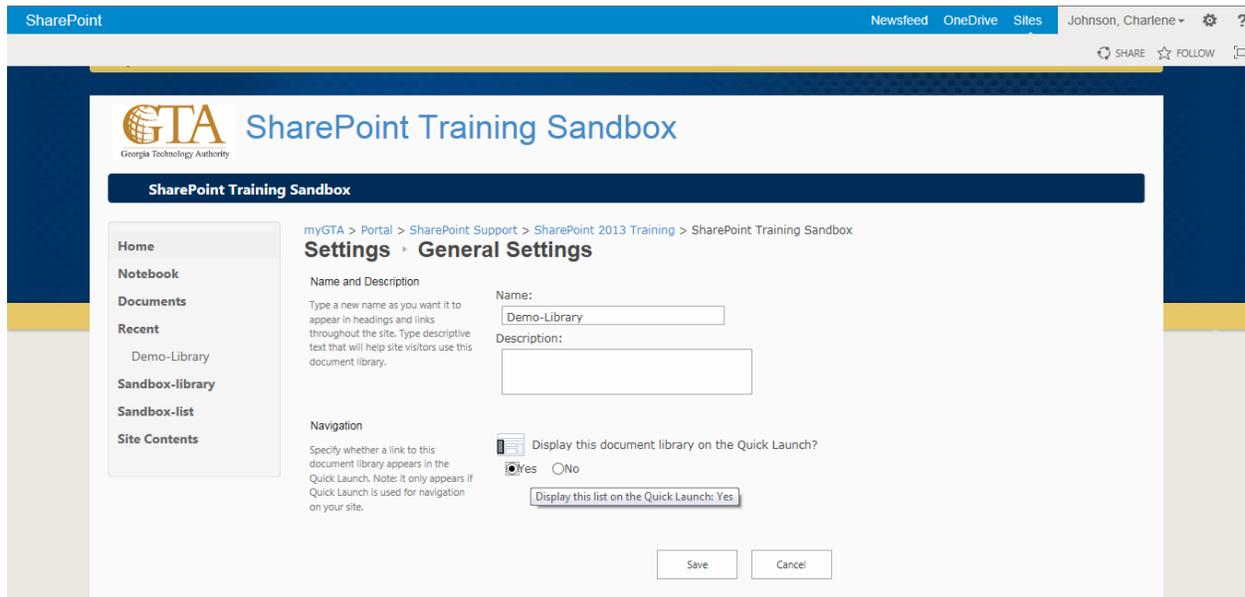


Figure 14 General Settings when displayed for the library

7.2 Rename a Library

You can rename a library.

To rename a library,

1. Navigate to the **Library Settings** for the library
2. SharePoint will display the **Settings** page for the library
3. From the **Settings** page, click **List name, description and navigation**

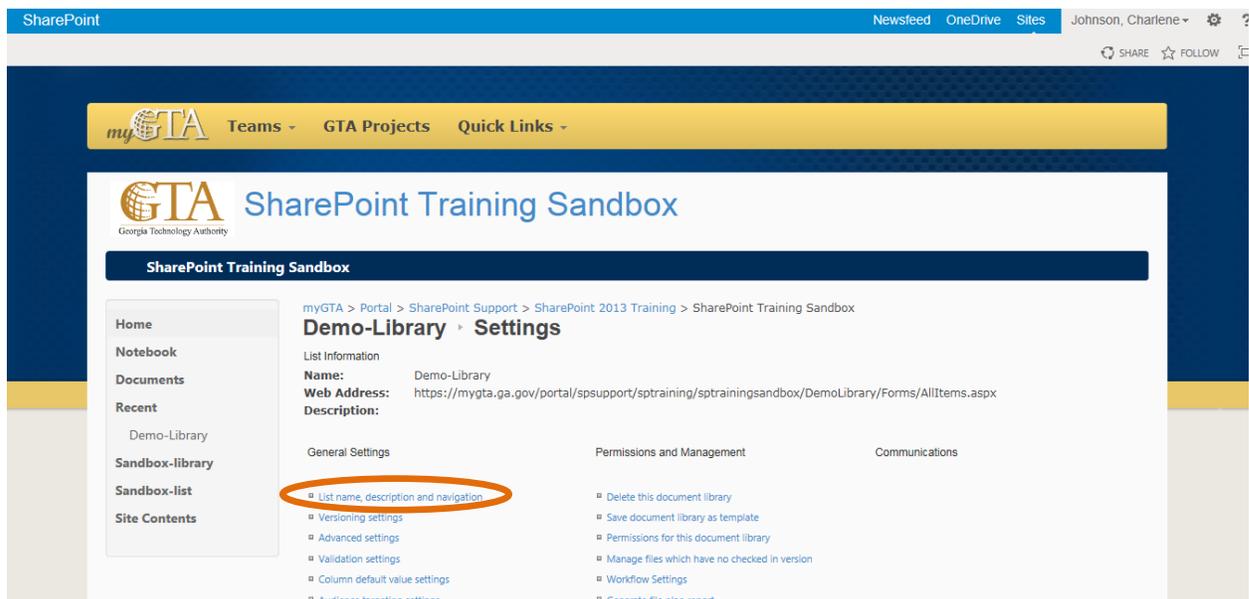


Figure 15 List name, description and navigation option when the Settings page is displayed

4. SharePoint will display the **General Settings** for the library
5. Enter a new **Name** for the library
6. Then click **Save**

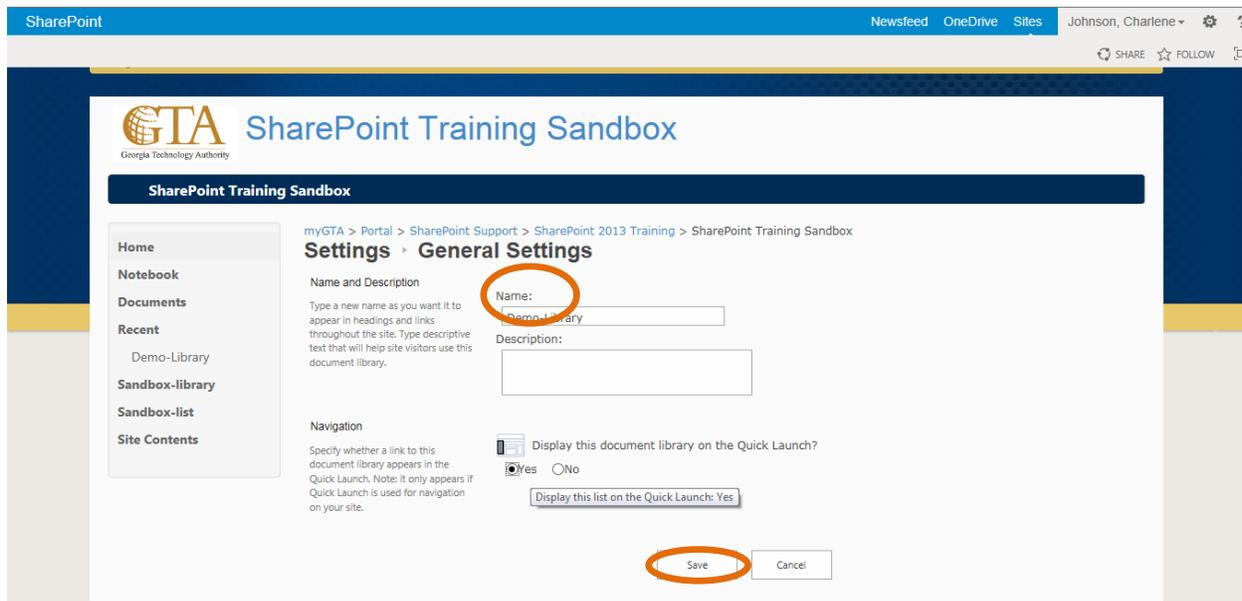


Figure 16 Name field when you want to change the name of a library

7.3 Manage the Quick Launch

When you first add a library, the location of the library will default to Site Contents. You can change the navigation to add or remove the library from the Quick Launch.

To add or remove a library from Quick Launch,

1. Navigate to the **Library Settings** for the library
2. SharePoint will display the **Settings** page for the library
3. From **the Settings page**, click **List name, description and navigation**
4. SharePoint will display the **General Settings** for the library
5. Click **Yes** to **Display this document library on the Quick Launch?** or click **No** if you don't want to display the library on the Quick Launch
6. Then click **Save**

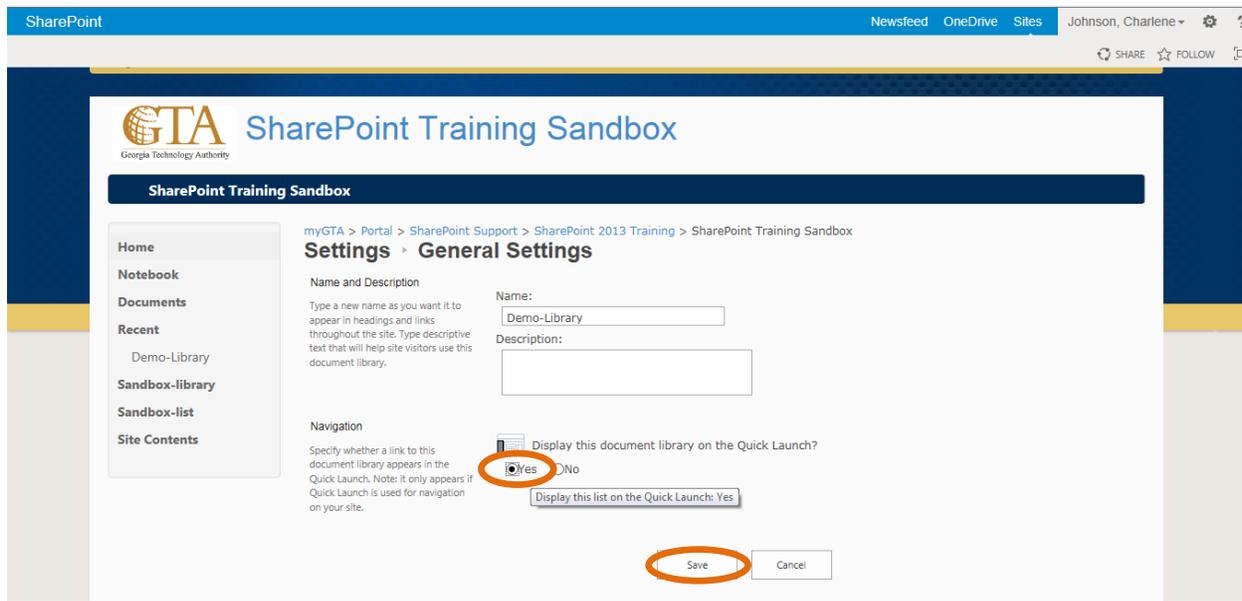


Figure 17 General Settings when you want to change the navigation

7.4 Delete a Library

You can delete library. When a library is deleted, SharePoint will move the library and all of its contents to the **Recycle Bin**.

Note: You can restore a deleted library from the Recycle Bin which can be found in Site Contents.

To delete a library,

1. Navigate to the **Library Settings** for the library
2. SharePoint will display the **Settings** page for the library
3. From the **Settings** page, click **Delete this document library**

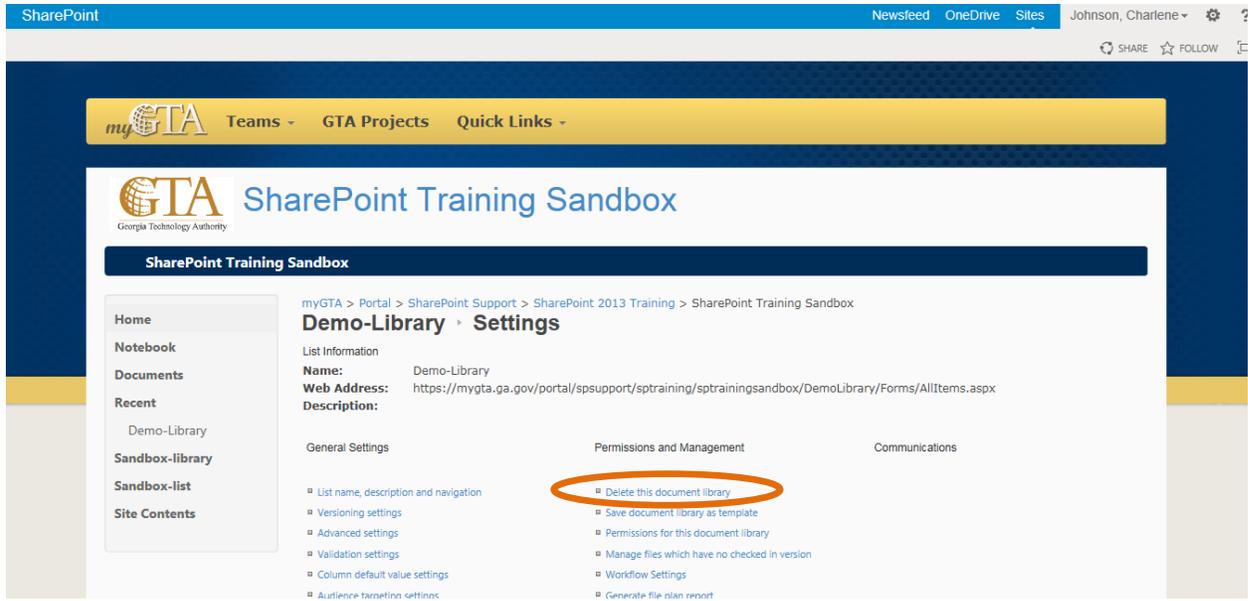


Figure 18 Delete this document library option when the Settings page is displayed

4. SharePoint will display a confirmation box
5. Confirm the delete, by clicking **OK** and SharePoint will delete the library

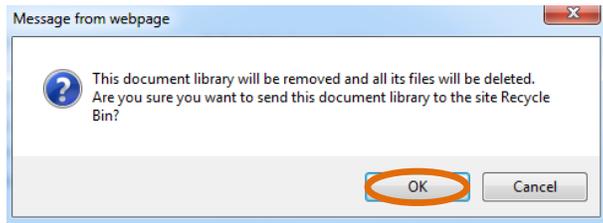


Figure 19 Confirmation box when you want to delete a library

8.0 Apply Your Knowledge Exercises: General Settings

8.1 Display General Settings

You can display the **General Settings** for a library.

To display the General Settings,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click **Site Contents**
3. Scroll through the tiles to find the library you created and click on the ellipses next to it
4. Then click **SETTINGS**

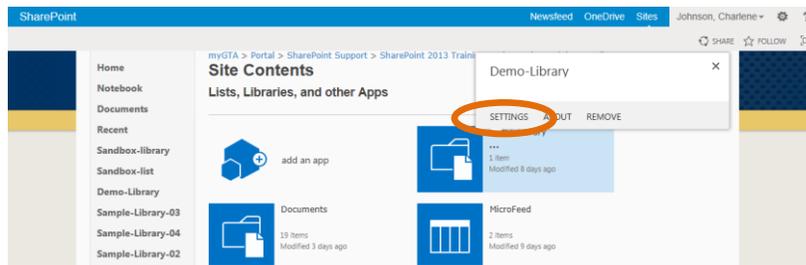


Figure 20 SETTINGS when you click the ellipses next to a library in Site Contents

5. SharePoint will display the **Settings** page for the library

8.2 Rename a Library

You can rename a library.

To rename a library,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click **Site Contents**
3. Scroll through the tiles to find the library you created and click on the ellipses next to it
4. Then click **SETTINGS**
5. SharePoint will display the **Settings** page for the library
6. On the **Settings** page in the section named **General Settings**, click **List name, description and navigation**
7. SharePoint will display the **General Settings** for the library
8. Enter a new **Name** for the library
9. Then click **Save**

8.3 Display the Library in Quick Launch

You can display a library in Quick Launch so that you can navigate to it easily using left navigation.

To display a library in Quick Launch,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click **Site Contents**
3. Scroll through the tiles to find the library you created and click on the ellipses next to it

4. Then click **SETTINGS**
5. SharePoint will display the **Settings** page for the library
6. On the **Settings** page in the section named **General Settings**, click **List name, description and navigation**
7. SharePoint will display the **General Settings** for the library
8. Click **Yes to Display this document library on the Quick Launch?**
9. Then click **Save**
10. SharePoint will display the library in the Quick Launch

8.4 Delete a Library

You can delete a library.

To delete a library,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click **Site Contents**
3. Scroll through the tiles to find the library you created and click on the ellipses next to it
4. Then click **SETTINGS**
5. SharePoint will display the **Settings** page for the library
6. On the **Settings** page in the section named **Permissions and management**, click **Delete this document library**
7. SharePoint will prompt you for confirmation and you will confirm the delete
8. SharePoint will delete the library and move it to the **Recycle Bin**

8.5 Restore a Library

You can restore a library that was deleted.

To restore a library,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click **Site Contents**
3. Click on the **RECYCLE BIN** in the upper right corner of the content area
4. Scroll through the tiles to find the library you created and click on the box next to it
5. Then click **Restore Selection**
6. SharePoint will remove the library and its contents from the Recycle Bin and make it available again.

9.0 Versioning

9.1 Manage Versioning

You can add versioning to any library. You can use minor versions, e.g. 1.1, 1.2, 1.3, etc. or major versions, e.g. 1.0, 2.0, 3.0, etc.

To add versioning to a library,

1. Navigate to the **Library Settings** page for the library
2. SharePoint will display the **Settings** page for the library
3. From **General Settings**, click **Versioning settings**

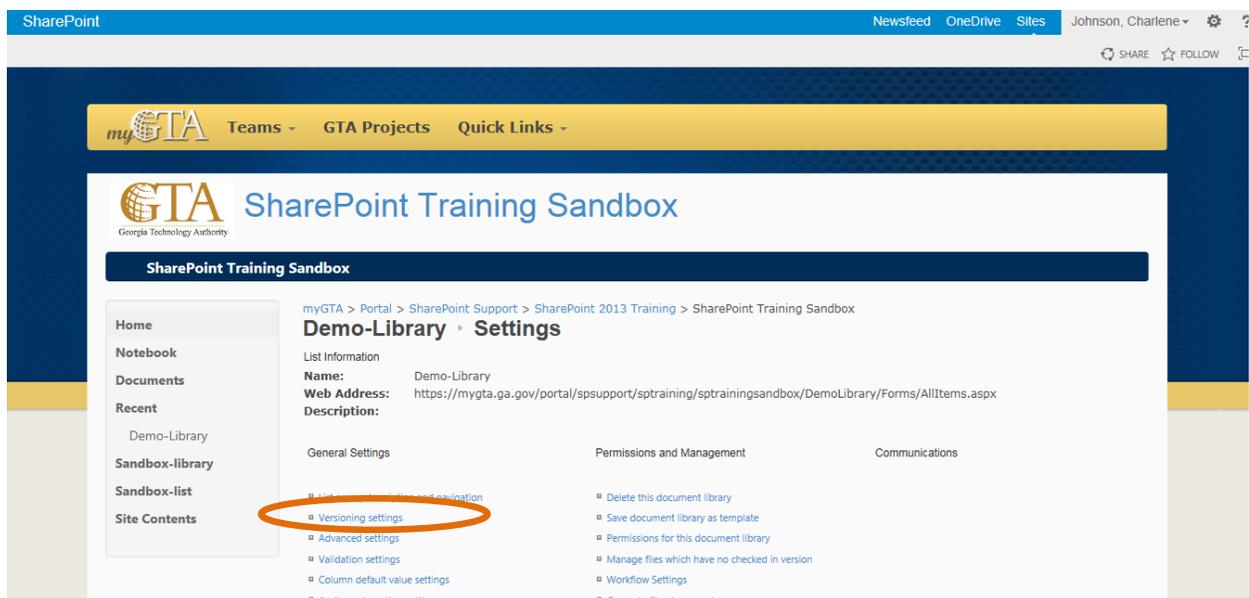


Figure 21 Versioning settings option when the Settings page is displayed

4. SharePoint will display the **Versioning Settings** for the library
5. Select the versioning options you want the library to have
6. Then click **OK**

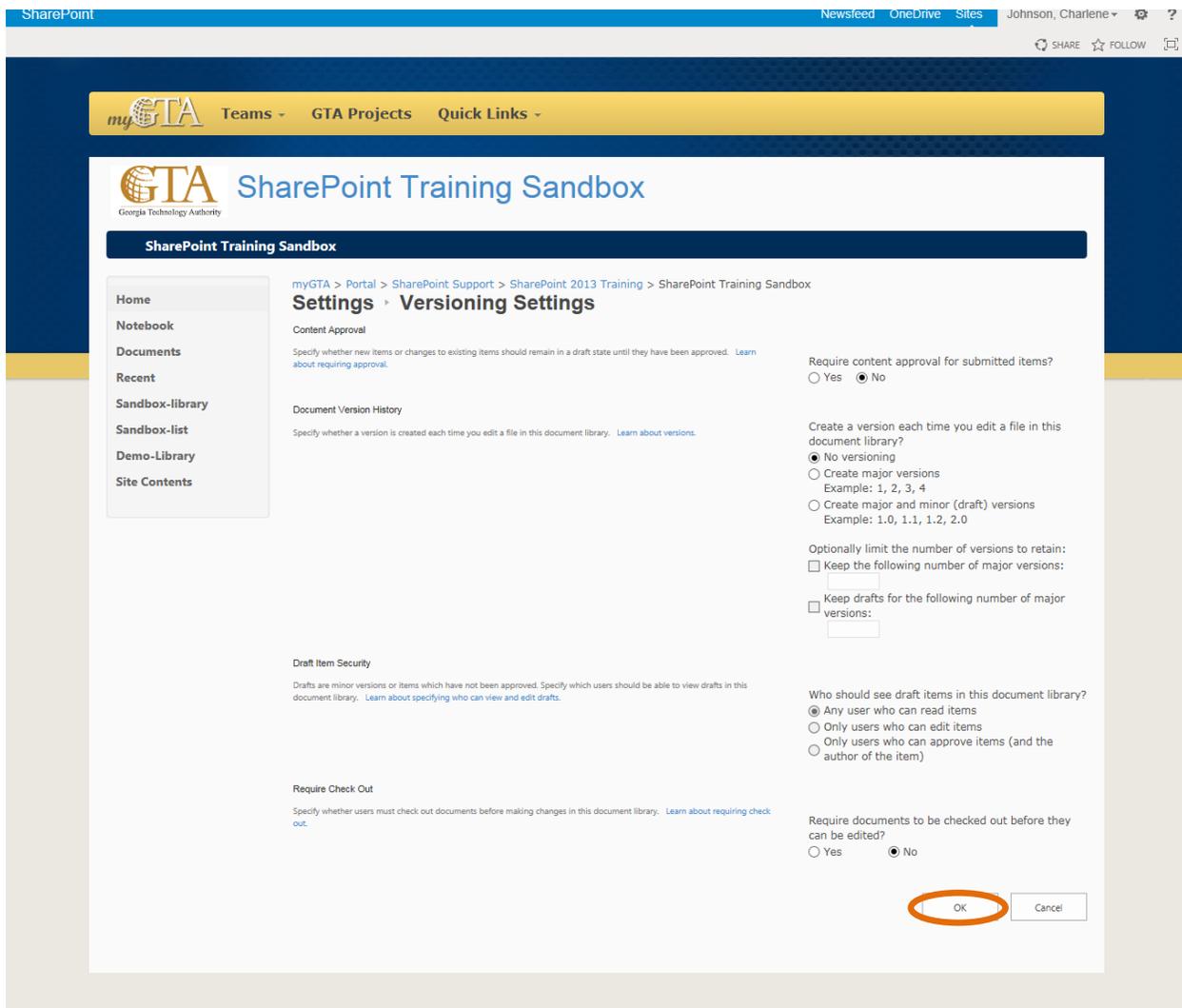


Figure 22 Versioning settings option when the Versioning Settings page is displayed

10.0 Apply Your Knowledge Exercises: Versioning

10.1 Add Versioning

To add versioning to a library,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click on the library name using **Quick Launch** SharePoint will display the library you created
3. Click the **LIBRARY** control tab

Revised 03/03/2014

4. SharePoint will display the library ribbon
5. On the ribbon, click **Library Settings**
6. SharePoint will display the **Settings** page for the library
7. From **General Settings**, click **Versioning settings**
8. SharePoint will display the **Versioning Settings** for the library
9. Select the versioning options you want the library to have: **Create major and minor (draft) versions**
10. Then click **OK**
11. SharePoint will add versioning to all documents in the library

11.0 Library Columns

When a library is created, default columns are assigned to the library including Created, Modified, Title, Created By, and Modified By. You can add a new column, change the values for an existing column or delete a column.

11.1 Add a Column

To add a new column,

1. Navigate to **Library Settings** for the library
2. SharePoint will display the **Settings** for the library
3. From the **Columns** section of the **Settings** page, click **Create column**

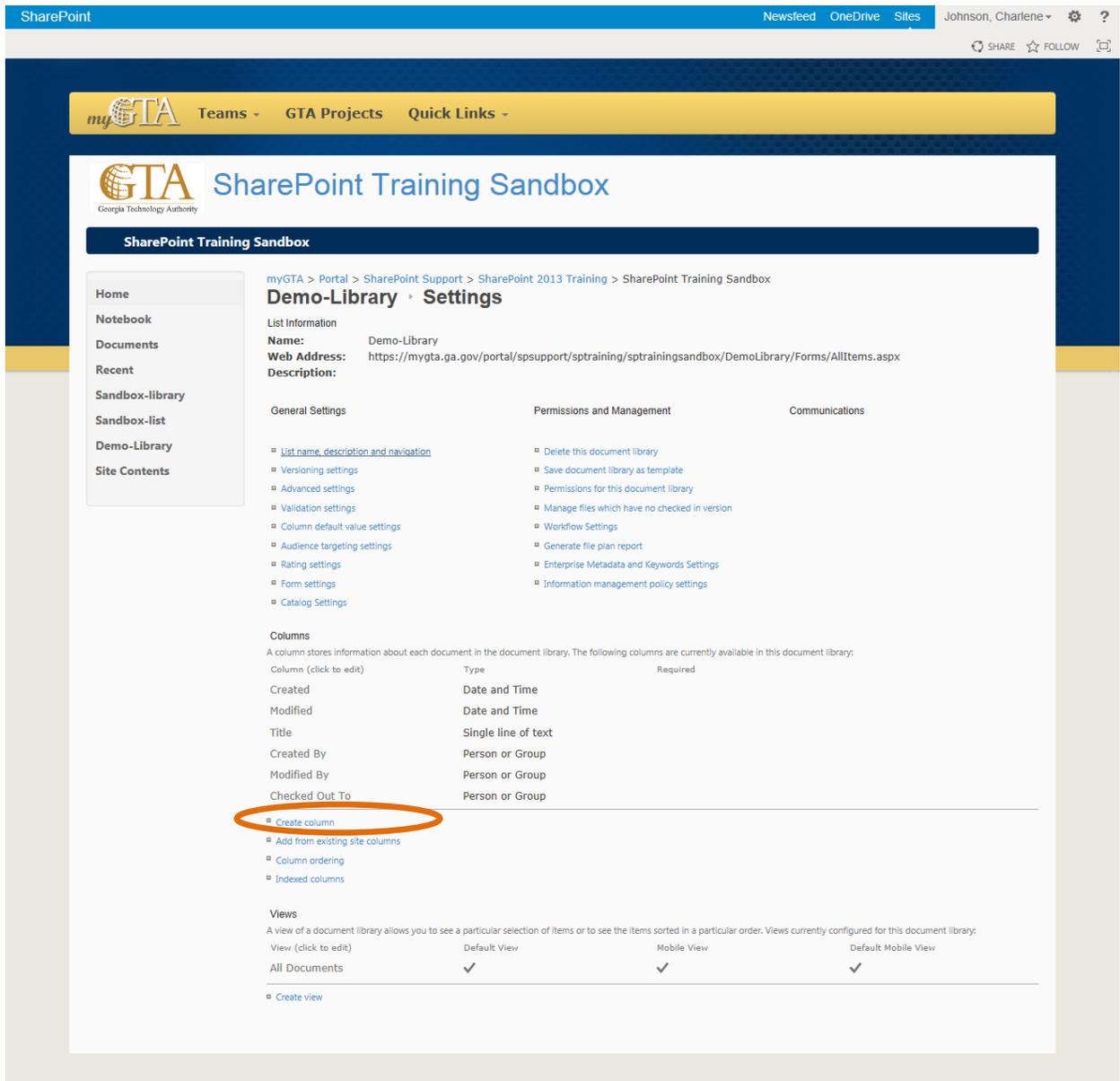


Figure 23 Settings page when you want to select Create columns

- SharePoint will display the **Create Columns** page for the library
- Enter a **Column Name** and select the column options you want the library to have
- Then click **OK**

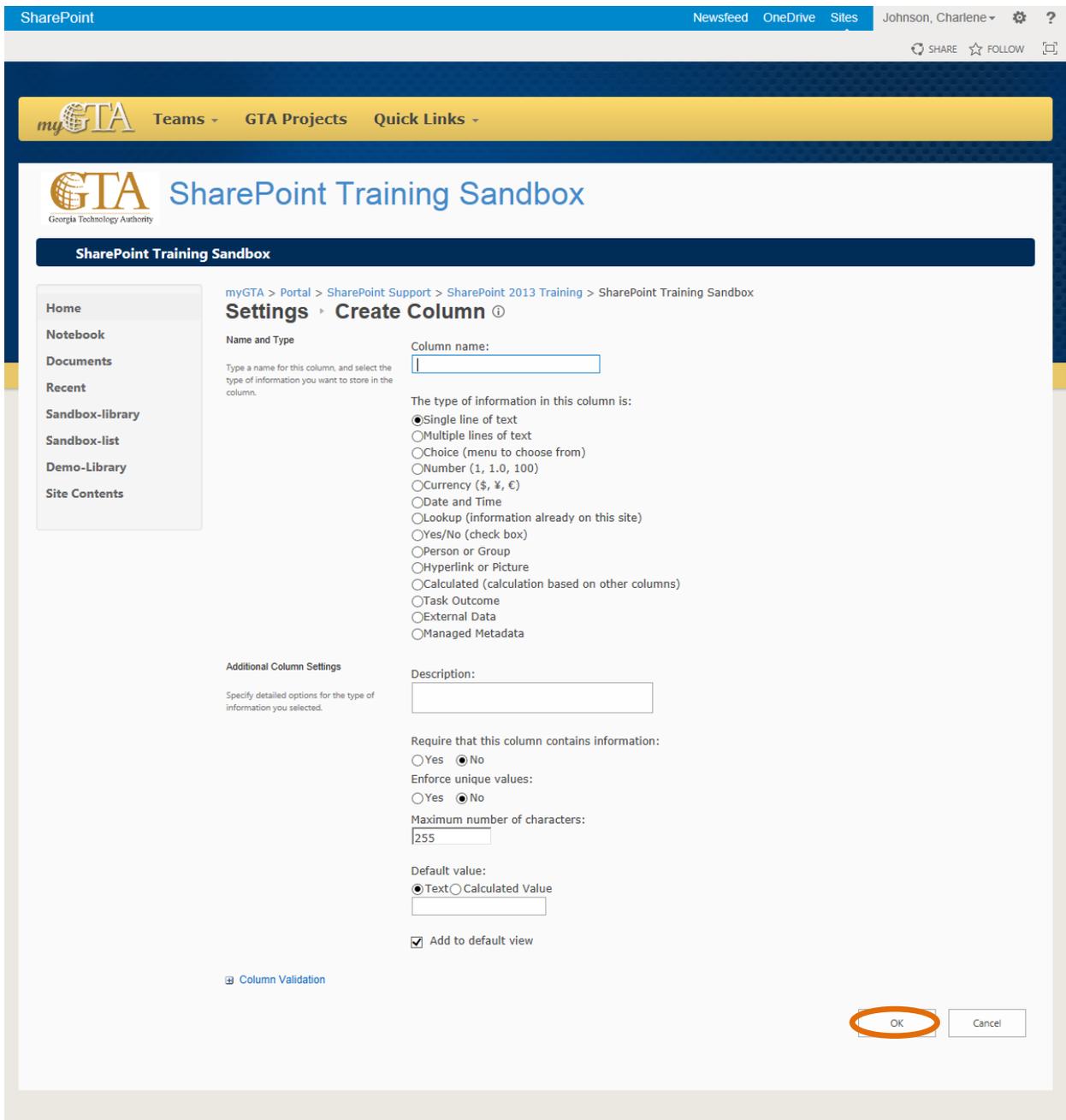


Figure 24 Create Column page when you want to create a new column

11.2 Edit a Column

You can edit a column and change the type of information or the format. If you have a **Choice** type of column, the column will have a table of values the user can select and you can modify the table of values as needed.

Note: Be careful when making changes to the columns, because SharePoint will not revise existing data. You will need to manually adjust all data as needed.

To edit a column,

1. Navigate to **Library Settings** for the library
2. SharePoint will display the **Settings** for the library
3. From the **Columns** section of the **Settings** page, click the name of the column that you want to change

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GTA SharePoint Support
Georgia Technology Authority

Portal ADM DSS SharePoint Support More Links

myGTA > Portal > SharePoint Support
SharePoint Job Aids > Settings

List Information
Name: SharePoint Job Aids
Web Address: https://mygta.ga.gov/portal/spsupport/SP Training Documents/Forms/UserTestingView.aspx
Description: This library contains self-help job aids

General Settings Permissions and Management Communications

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Column default value settings
- Audience targeting settings
- Rating settings
- Form settings
- Catalog Settings
- Delete this document library
- Save document library as template
- Permissions for this document library
- Manage files which have no checked in version
- Workflow Settings
- Generate file plan report
- Enterprise Metadata and Keywords Settings
- Information management policy settings

Columns

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

Column (click to edit)	Type	Required
Title	Single line of text	
TrainingDocType	Choice	✓
TrainingTopic	Choice	
SP_Status	Choice	✓
Created	Date and Time	
Modified	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

- Create column
- Add from existing site columns
- Column ordering
- Indexed columns

Views

A view of a document library allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this document library:

View (click to edit)	Default View	Mobile View	Default Mobile View
All Documents		✓	✓
UserTestingView	✓	✓	

- Create view

Figure 25 Columns when you want to modify existing column values

7. SharePoint will display the **Settings > Edit Column** page for the column

8. Edit the column information that is displayed on the page, as needed
9. Then click **OK**

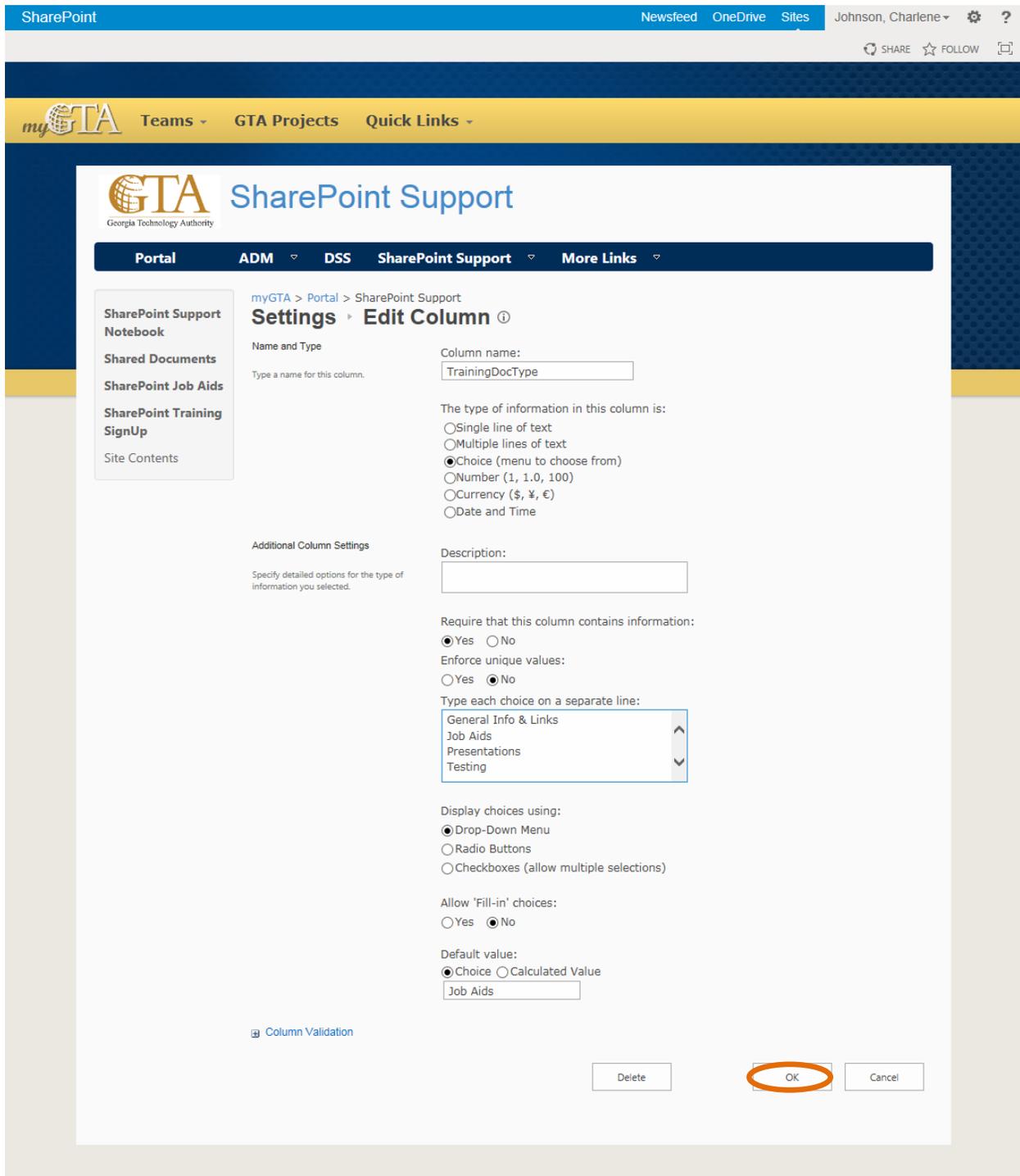


Figure 26 Column Information when you want to modify an existing column

11.3 Delete a Column

You can delete a column.

Note: When a column is deleted, it cannot be restored. It is permanently deleted.

To delete a column,

1. Navigate to **Library Settings** for the library
2. SharePoint will display the **Settings** for the library
3. From the **Columns** section of the **Settings** page, click the name of the column you want to delete

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Portal ADM DSS SharePoint Support More Links

myGTA > Portal > SharePoint Support
SharePoint Job Aids > Settings

List Information
Name: SharePoint Job Aids
Web Address: https://mygta.ga.gov/portal/spsupport/SP Training Documents/Forms/UserTestingView.aspx
Description: This library contains self-help job aids

General Settings Permissions and Management Communications

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Column default value settings
- Audience targeting settings
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- Form settings
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- Delete this document library
- Save document library as template
- Permissions for this document library
- Manage files which have no checked in version
- Workflow Settings
- Generate file plan report
- Enterprise Metadata and Keywords Settings
- Information management policy settings

Columns

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

Column (click to edit)	Type	Required
Title	Single line of text	
TrainingDocType	Choice	✓
TrainingTopic	Choice	
SP_Status	Choice	✓
Created	Date and Time	
Modified	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

- Create column
- Add from existing site columns
- Column ordering
- Indexed columns

Views

A view of a document library allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this document library:

View (click to edit)	Default View	Mobile View	Default Mobile View
All Documents		✓	✓
UserTestingView	✓	✓	

- Create view

Figure 27 Columns when you want to select a column and delete it

4. SharePoint will display the **Settings > Edit Column** page for the library

5. Click the **Delete** button at the bottom of the page

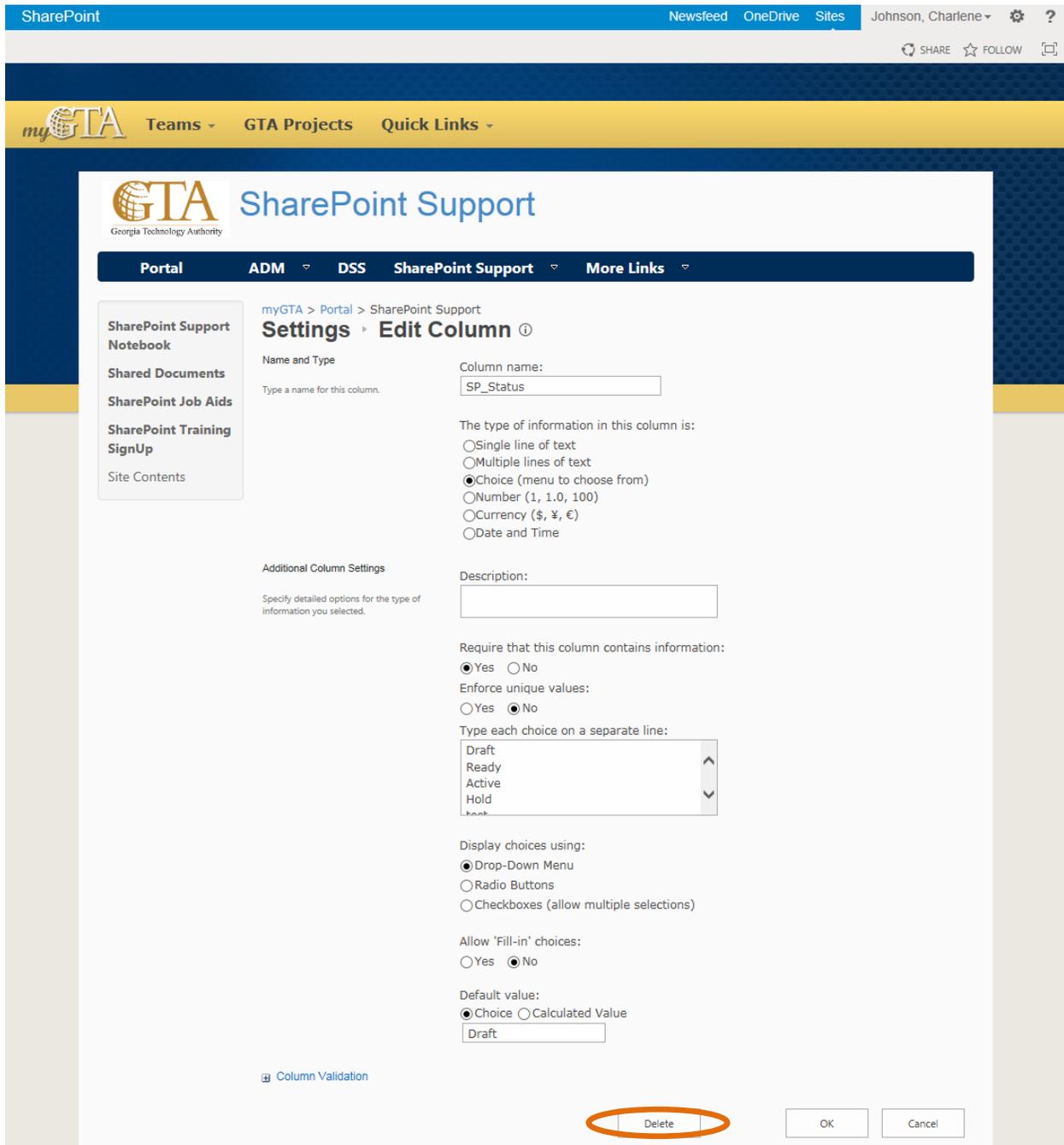


Figure 28 Edit Column when you want to select a column and delete it

6. SharePoint will display a confirmation box
7. Confirm the delete, by clicking **OK** and SharePoint will delete the column

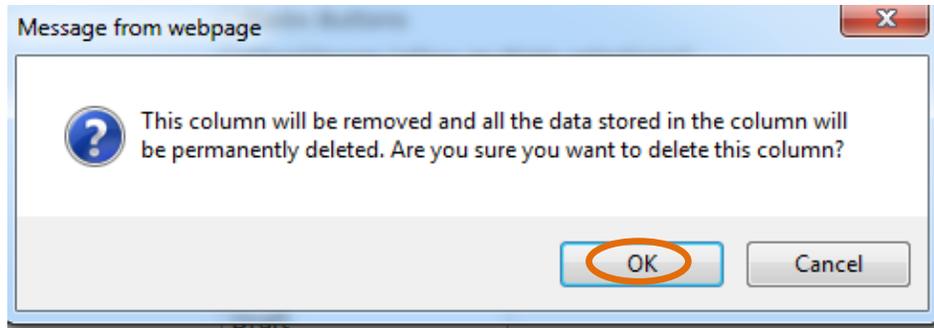


Figure 29 Confirmation box when you want to delete a column

12.0 Apply Your Knowledge Exercises: Library Columns

12.1 Add a Column

You can add a column to a library.

To add a column to a library,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click on the library name using **Quick Launch** SharePoint will display the library you created
3. Click the **LIBRARY** control tab
4. SharePoint will display the library ribbon
5. On the ribbon, click **Library Settings**
6. SharePoint will display the **Settings** page for the library
7. From the **Columns** section of the **Settings** page, click **Create column**
8. SharePoint will display the **Create Columns** page for the library
9. Enter the following information:
 - a. **Column name:** SOG Agency
 - b. Click the button for **Choice (menu to choose from)**
 - c. **Description:** The SOG Agency that will have access to these documents
 - d. **Choice #1:** Select One or more
 - e. **Choice #2:** EGAP
 - f. **Choice #3:** GETS
 - g. **Choice #4:** GTA
 - h. **Choice #5:** SAO
 - i. Click the button for **Display choices using: Checkboxes (allow multiple selections)**
10. Add another column for the effective date by entering the following information:

- a. **Column name:** SOG Eff Date
 - b. Click the button for **Date and Time**
 - c. **Description:** The date the document is effective for SOG
 - d. Click the button for **Yes** for **Require that this column contains information**
 - e. Click the button for **Date Only** of **Date and Time Format**
 - f. Click the button for **Friendly** of **Display Format**
 - g. Then click **OK**
11. SharePoint will add the columns to the library

12.2 Edit a Column

You can edit a column.

To edit a column,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click on the library name using **Quick Launch** SharePoint will display the library you created
3. Click the **LIBRARY** control tab
4. SharePoint will display the library ribbon
5. On the ribbon, click **Library Settings**
6. SharePoint will display the **Settings** page for the library
7. From the **Columns** section of the **Settings** page, click the name of the column that you want to change: SOG Agency
8. Change the **Column name** to: 2014 SOG Agencies
9. Add **Choice #6:** Finance
10. Then click **OK**
11. SharePoint will retain the changes to the columns

12.3 Delete a Column

You can delete a column.

To delete a column,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click on the library name using **Quick Launch** SharePoint will display the library you created
3. Click the **LIBRARY** control tab
4. SharePoint will display the library ribbon

Revised 03/03/2014

5. On the ribbon, click **Library Settings**
6. SharePoint will display the **Settings** page for the library
7. From the **Columns** section of the **Settings** page, click the name of the column you want to delete: SOG Eff Date
8. SharePoint will display the **Settings > Edit Column** page for the library
9. Click the **Delete** button at the bottom of the page
10. SharePoint will display a confirmation box
11. Confirm the delete, by clicking **OK** and SharePoint will delete the column

13.0 Library Views

A view is a formatted display of the contents of a library. A view can be public that can be viewed by all users or a private view that can only be viewed by you.

Any public view can be set as the default view for the library. When the library is created, the default view is set to **All Documents**.

13.1 Create a View

To create a view,

1. Navigate to the library
2. Click the ellipses near the **All Documents** view and a drop down will display
3. From the drop down, click **Create View**

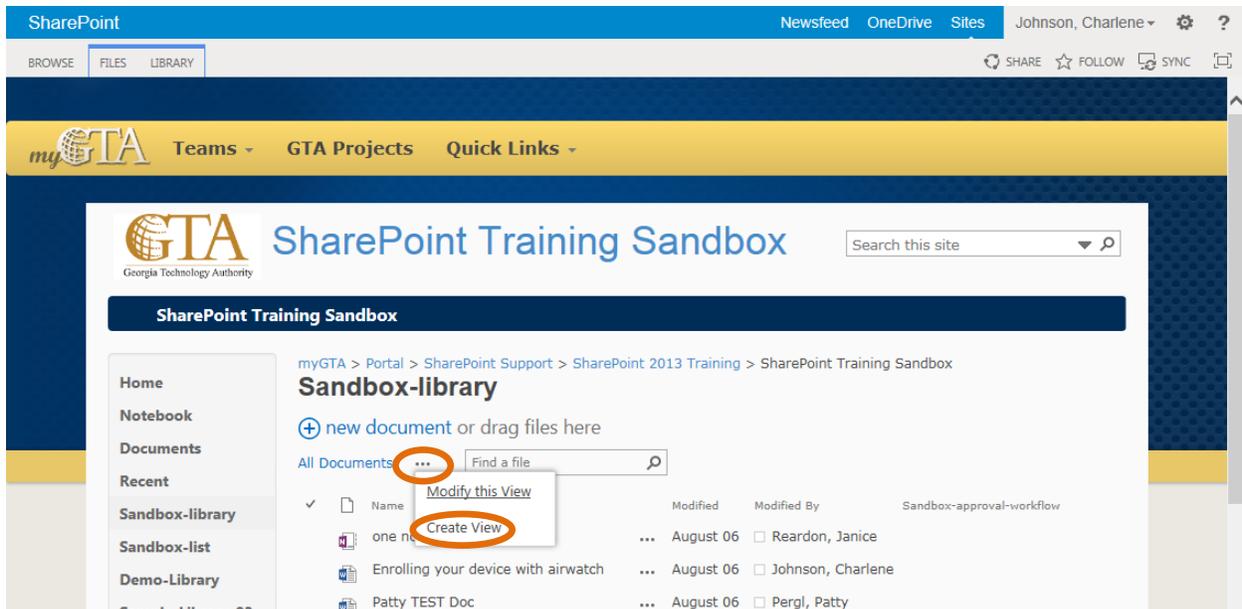


Figure 30 Drop down when you click the ellipses near to the All Documents view

4. SharePoint will display the **Settings > View Type**
5. To use the **All Documents** view as a template, click **All Documents** at the bottom of the page. Or you can select any of the other view types to use as a template.

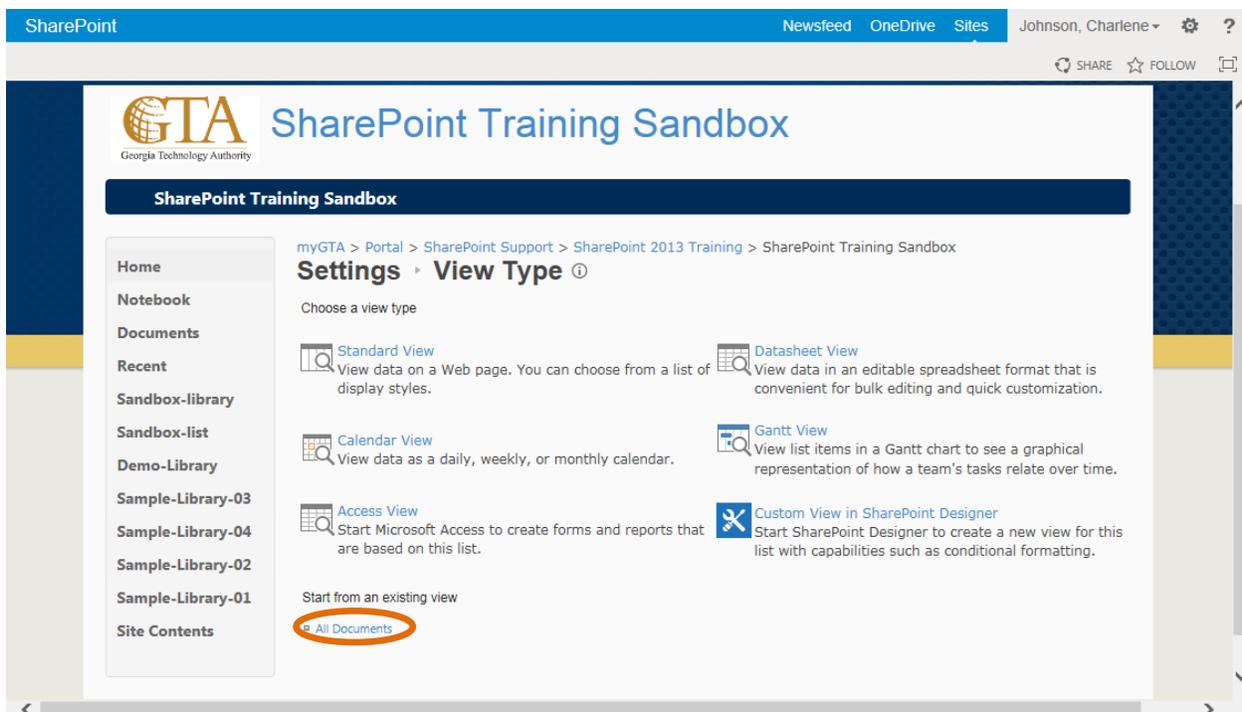


Figure 31 View Types when you want to create a view

6. SharePoint will display the **Settings > Create View**
- Revised 03/03/2014

7. Complete the information for the view including the following:
 - Enter the **View Name**
 - Click the box if you want to **Make this the default view**
 - Click the radio button to **Create a Personal View** or **Create a Public View**
 - Select or deselect the box and the **Position from Left** for any columns you want or do not want to display in the view
 - Enter **Sort, Filter** and **Group By** information
8. Then click **OK** and SharePoint will create the view

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SharePoint Training Sandbox

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Settings - Create View

OK Cancel

Name: _____

View Name: _____

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

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

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:
 Name (for use in forms) [v]
 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 [v]
 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).

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.

Show all items in this view
 Show items only when the following is true:
 Show the items when column [None] [v] is equal to []
 And Or
 When column [None] [v] is equal to []

Show More Columns...

Tabular 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) [v]

OK Cancel

Figure 32 Create View options when you want to create a view

13.2 Display a View

To display a view,

1. Navigate to the library
2. Click any name near the **All Documents** view and SharePoint will display the view

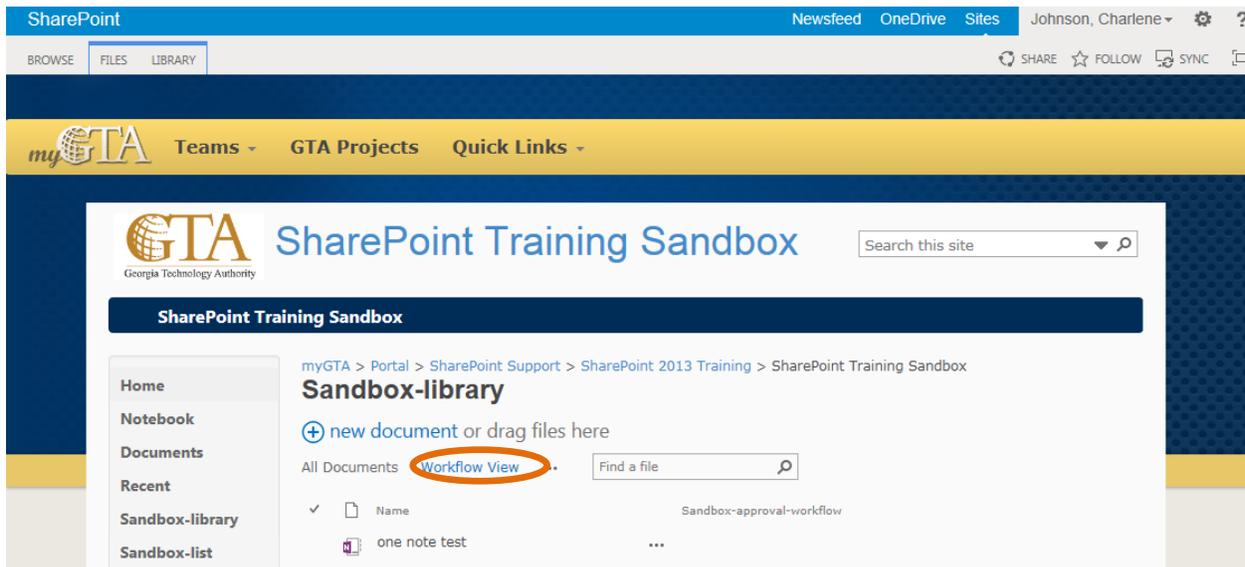


Figure 33 Sample view when you want to select a different view

13.3 Modify a View

To modify a view,

1. Navigate to the library
2. Click the name of the view to display it
3. Click the ellipses next to the name of the view and a drop down will display
4. From the drop down, click **Modify this View**

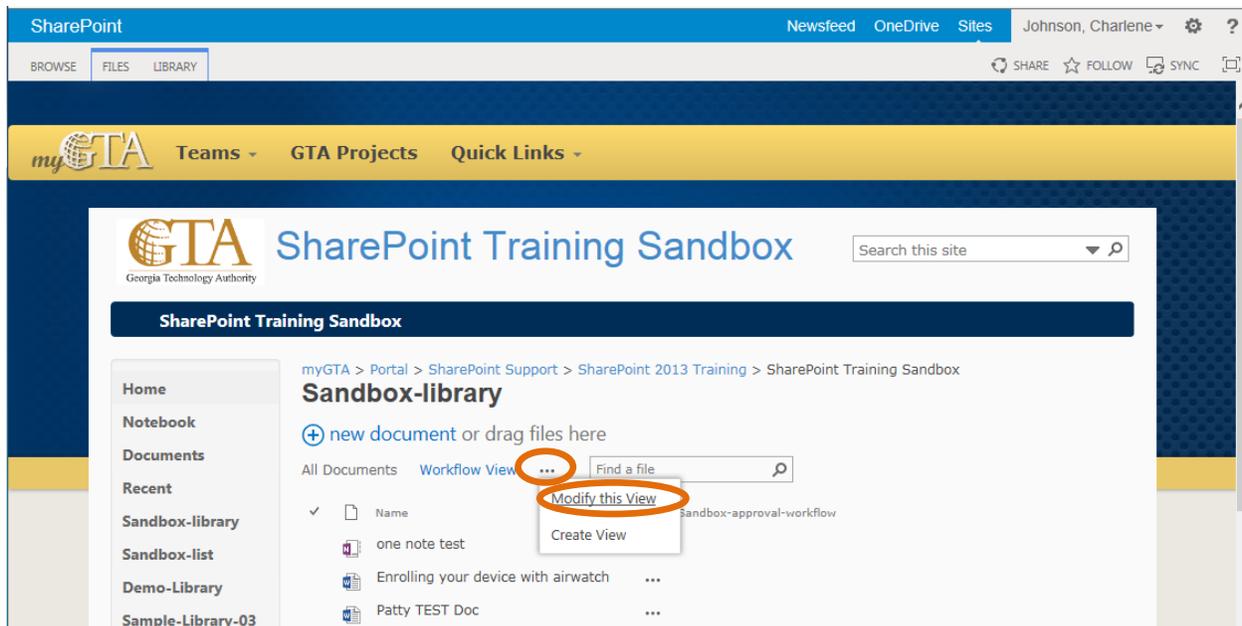


Figure 34 Modify this View when you want to change the displayed view

5. SharePoint will display the **Settings > Edit View**
6. Edit the view
7. Then click **OK** and SharePoint will display the modified view

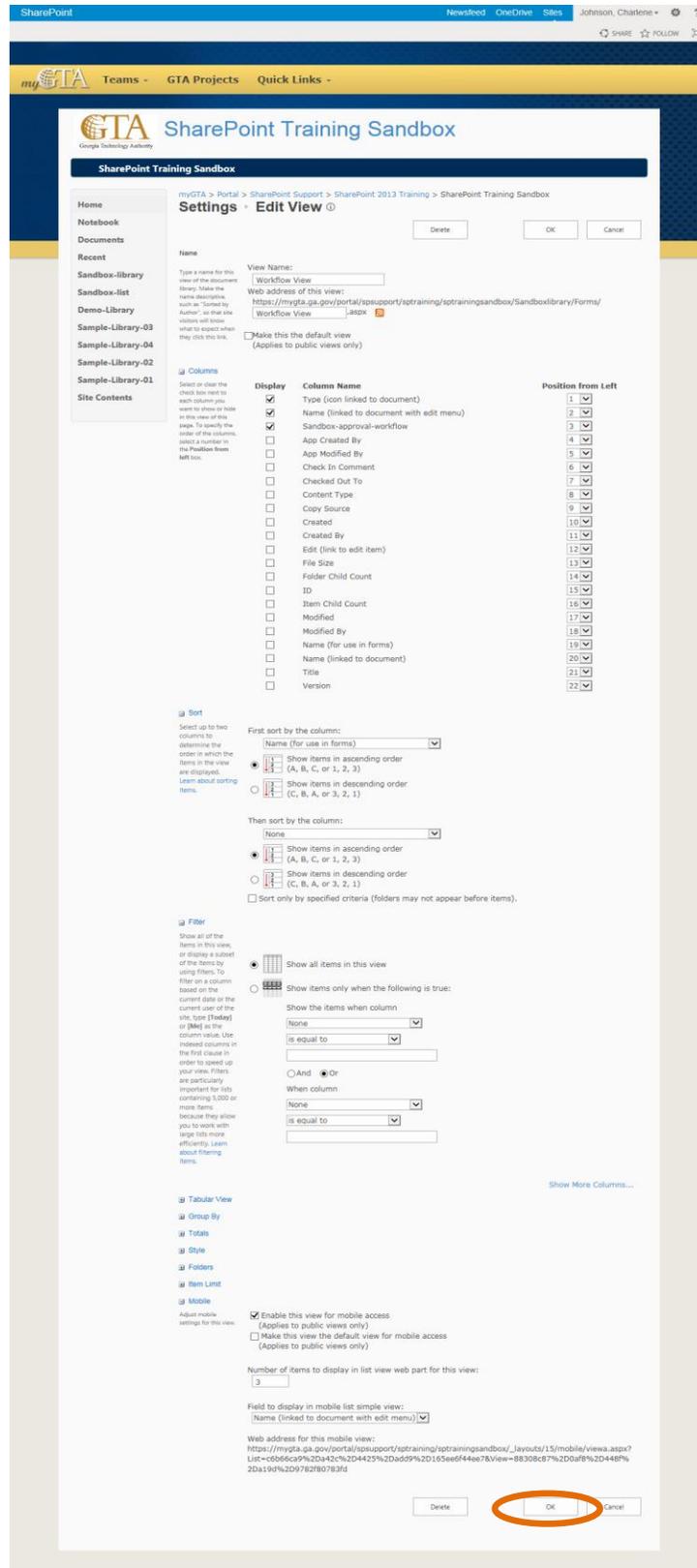


Figure 35 Edit View when you want to modify a view

13.4 Delete a View

To delete a view,

1. Navigate to the library
2. Click the name of the view to display it
3. Click the ellipses next to the name of the view and a drop down will display
4. From the drop down, click **Modify this View**

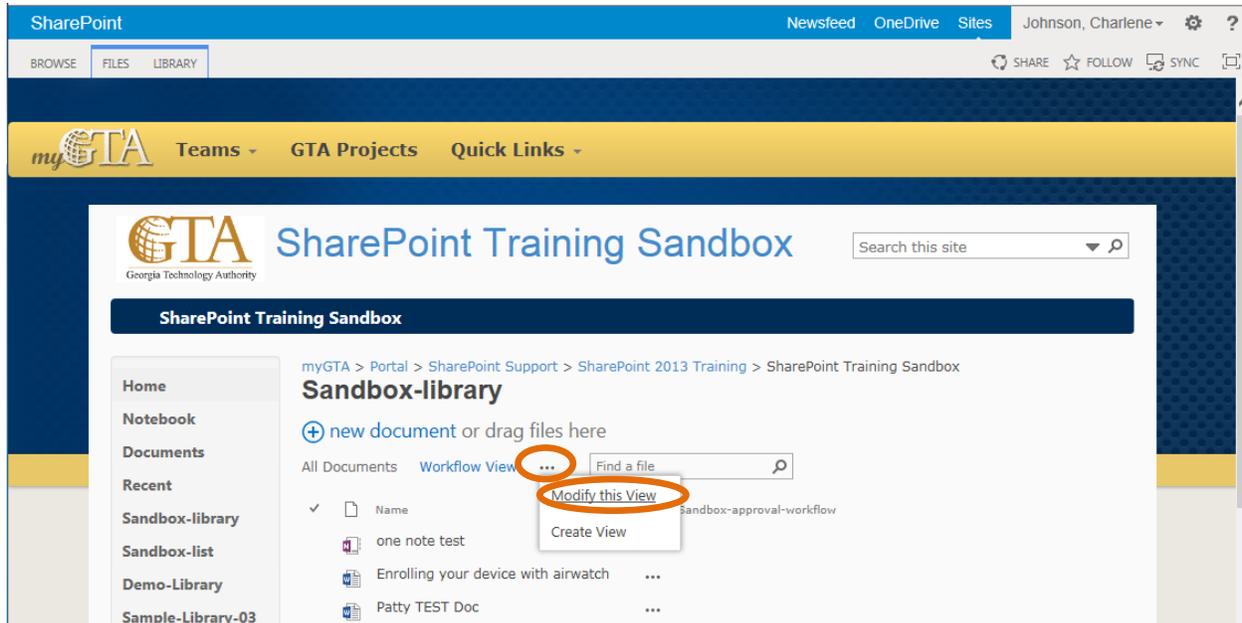


Figure 36 Modify this View when you want to delete the displayed view

5. SharePoint will display the **Settings > Edit View**
6. Click **Delete**

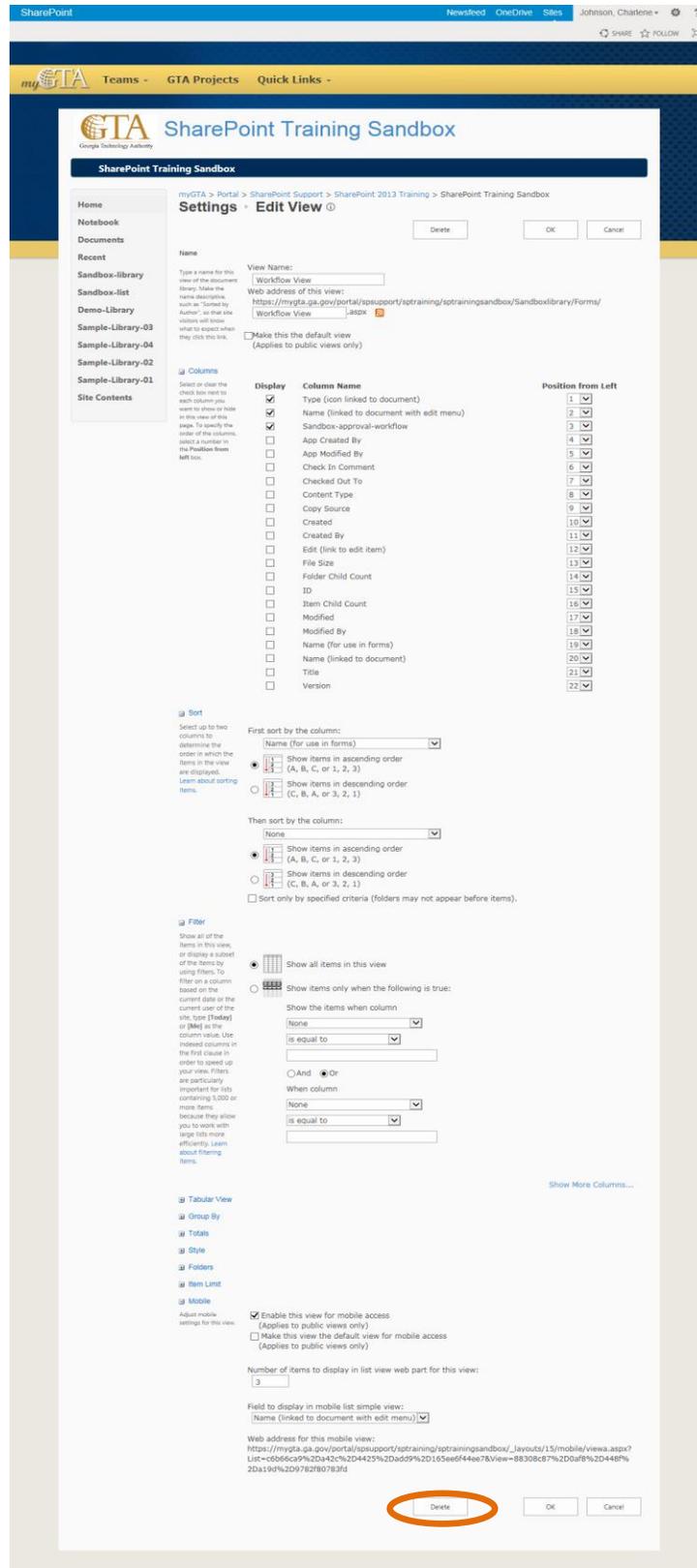


Figure 37 Edit View when you want to delete the displayed view

7. SharePoint will display a confirmation box
8. Confirm the delete, by clicking **Yes** and SharePoint will delete the view

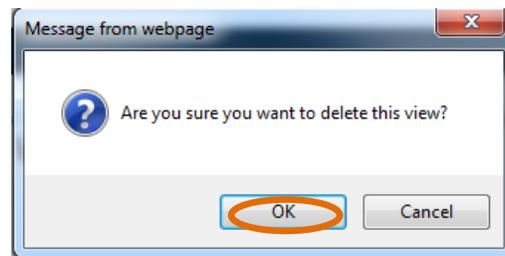


Figure 38 Confirmation box when you want to delete a view

14.0 Apply Your Knowledge Exercises: Library Views

14.1 Create a View

You can create a view of a library.

To create a view,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click on **Sample-Library-01** using **Quick Launch** and SharePoint will display the contents of the library
3. Click the ellipses near the **All Documents** view and a drop down will display
4. From the drop down, click **Create View**
5. SharePoint will display the **Settings > View Type**
6. Use the **All Documents** view as a template, by clicking **All Documents** at the bottom of the page.
7. SharePoint will display the **Settings > Create View**
8. Complete the information for the view including the following:
 - a. **View Name:** any name that includes your initials
 - b. Click the radio button to **Create a Personal View**
 - c. Deselect the box next to the workflow **Column name:** Sandbox-approval-workflow
9. Then click **OK** and SharePoint will create the personal view where the Sandbox-approval-workflow column is not displayed

14.2 Modify a View

You can modify a view of a library.

To modify a view,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click on **Sample-Library-01** using **Quick Launch** and SharePoint will display the contents of the library
3. Click the ellipses near the **All Documents** view and a drop down will display
4. From the drop down, click **Modify this View**
5. SharePoint will display the **Settings > Edit View**
6. Change the information for the view including the following:
 - a. **View Name:** Modifications View
 - b. Click the box next to **Check In Comment** and set the **Position from Left** to 2
 - c. Click the box next to **ID** and set the **Position from Left** to 1
 - d. Click the box next to **Version** and set the **Position from Left** to 1
 - e. Click the '+' sign next to Group By to expand it
 - f. Click the down arrow next to **First group by the column** and then select **Modified** from the drop down
7. Then click **OK** and SharePoint will modify the view to display the additional columns, in the order requested and to also group the items by the date the document was modified

14.3 Delete a View

You can delete a view of a library.

To delete a view,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click on **Sample-Library-01** using **Quick Launch** and SharePoint will display the contents of the library
3. Click the **LIBRARY** tab to display the library ribbon
4. On the ribbon, click **Library Settings** and SharePoint will display the **Settings**
5. Scroll to the bottom of the **Settings** page, and click the view you created
6. Click **Delete**

7. SharePoint will display the popup: **Are you sure you want to delete this view?**
8. Then click **OK** to confirm the delete

15.0 Library Alerts

An Alert can be set up to notify you when a change is made in a library. Alerts are helpful when you want to monitor activity in a library by receiving an email notification from SharePoint. Alerts can be set up at the page, library, document or list level

Note: Unlike a Newsfeed, SharePoint does not retain a history of the Alerts.

15.1 Set up an Alert

To set up an alert,

1. Click the **LIBRARY** tab to display the library ribbon
2. On the ribbon, click **Alert Me**
3. SharePoint will display a drop down
4. From the drop down, click **Set alert on this library**

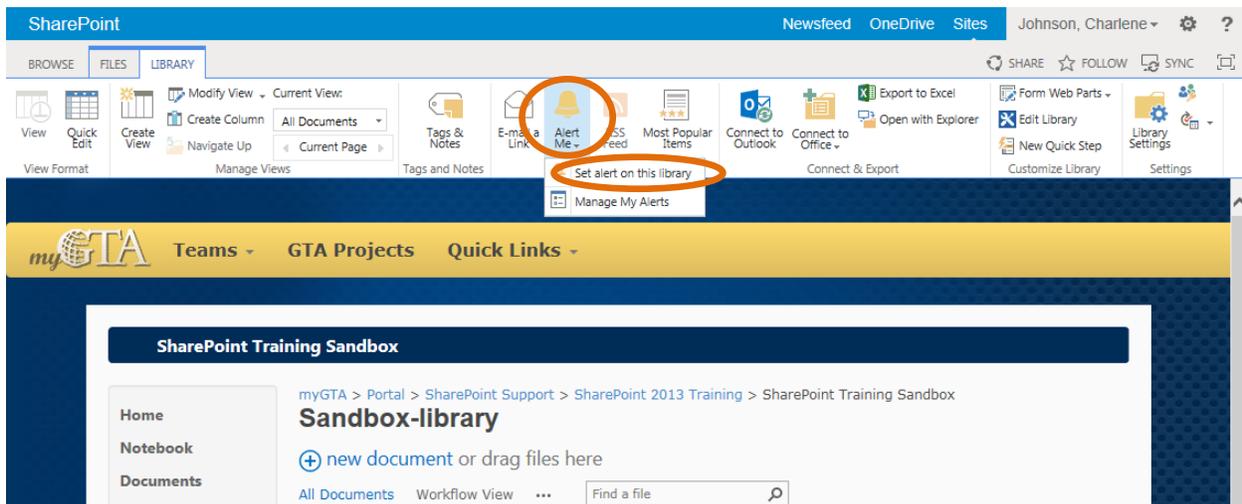


Figure 20 Library ribbon when you want to set up an alert

5. SharePoint will display the **New Alert** box
6. Enter the information for the **New Alert** including:
 - a. **Alert Title**
 - b. **Send Alerts To**

- c. **Delivery Method**
- d. **Change Type**
- e. **Send Alerts for These Changes**
- f. **When to Send Alerts**

7. Then click **OK**

Sandbox-library - New Alert

SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

OK Cancel

Alert Title
Enter the title for this alert. This is included in the subject of the notification sent for this alert.
Sandbox-library

Send Alerts To
You can enter user names or e-mail addresses. Separate them with semicolons.
Users:
Johnson, Charlene x

Delivery Method
Specify how you want the alerts delivered.
Send me alerts by:
 E-mail Charlene.Johnson@gta.ga.gov
 Text Message (SMS)
 Send URL in text message (SMS)

Change Type
Specify the type of changes that you want to be alerted to.
Only send me alerts when:
 All changes
 New items are added
 Existing items are modified
 Items are deleted

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your
Send me an alert when:
 Anything changes
 Someone else changes a document
 Someone else changes a document created by me
 Someone else changes a document last modified by me

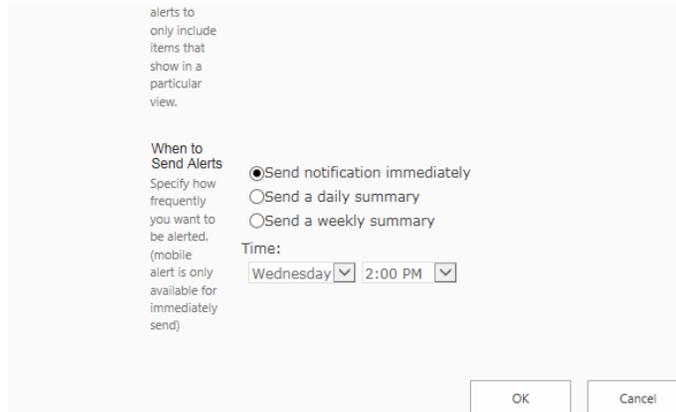


Figure 20 New Alert box when you want to set up an alert

8. SharePoint will send notification that the alert has successfully been added

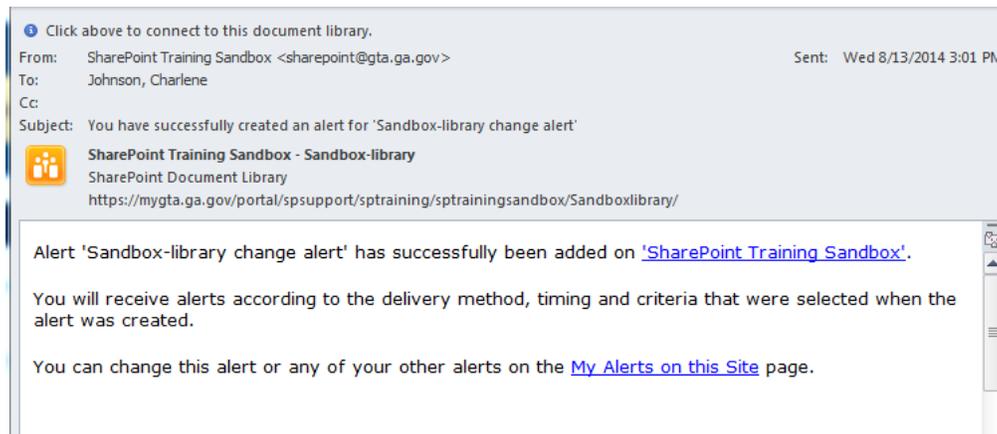


Figure 20 Notification when you successfully set up an alert

15.2 Edit Alerts

To edit your alerts,

1. Click the **LIBRARY** tab to display the library ribbon
2. On the ribbon, click **Alert Me**
3. SharePoint will display a drop down
4. From the drop down, click **Manage My Alerts**

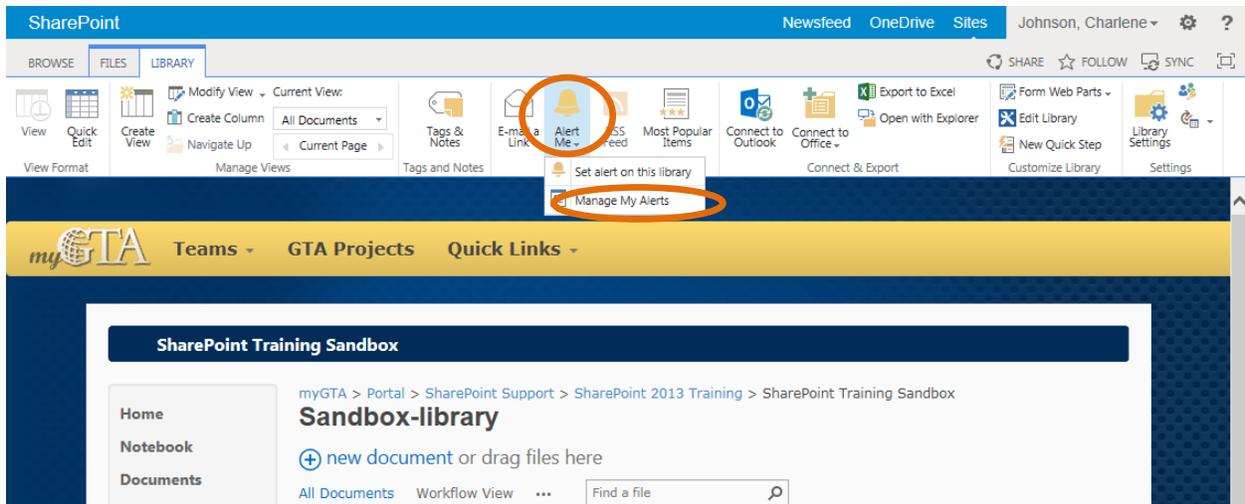


Figure 20 Library ribbon when you want to manage alerts

5. SharePoint will display **My Alerts on this Site**
6. Click the name of the alert you want to edit

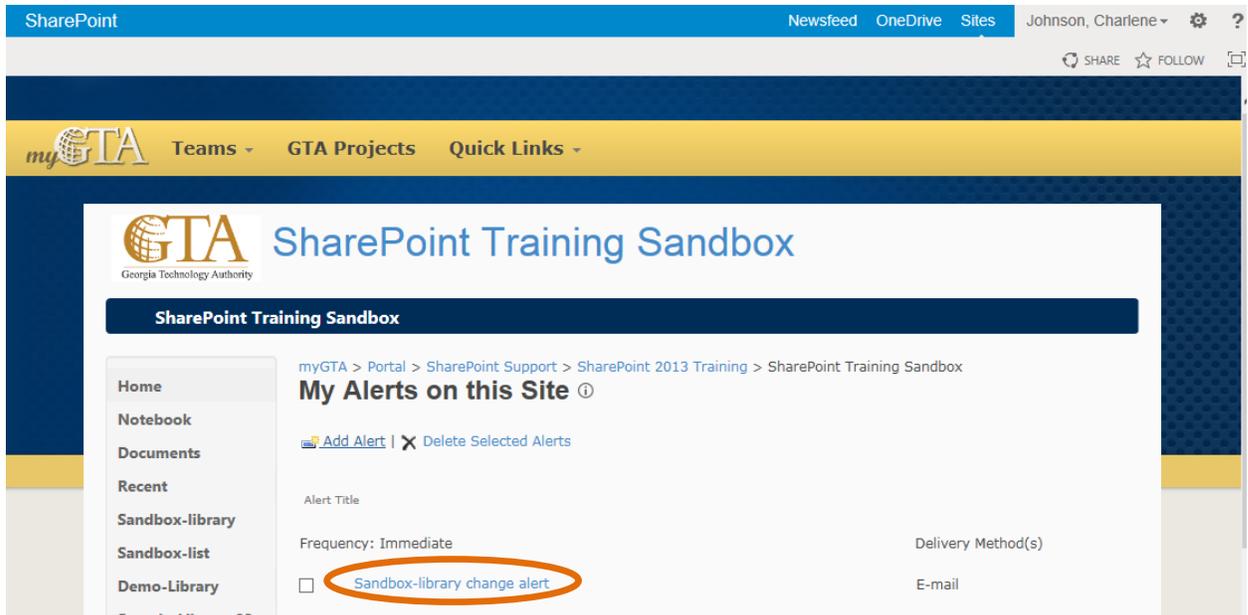


Figure 20 Check Box when you want to delete selected alerts

7. SharePoint will display the alert and you can edit it
8. Then click **OK**

SharePoint Newsfeed OneDrive Sites Johnson, Charlene

myGTA Teams - GTA Projects Quick Links -

GTA SharePoint Training Sandbox

Georgia Technology Authority

SharePoint Training Sandbox

myGTA > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Training Sandbox

Edit Alert

Delete OK Cancel

Alert Title
Enter the title for this alert. This is included in the subject of the notification sent for this alert.

Sandbox-library change alert

Delivery Method
Specify how you want the alerts delivered.

Send me alerts by:

E-mail Charlene.Johnson@gta.ga.gov

Text Message (SMS)

Send URL in text message (SMS)

Change Type
Specify the type of changes that you want to be alerted to.

Only send me alerts when:

All changes

New items are added

Existing items are modified

Items are deleted

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:

Anything changes

Someone else changes a document

Someone else changes a document created by me

Someone else changes a document last modified by me

When to Send Alerts
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

Send notification immediately

Send a daily summary

Send a weekly summary

Time: Wednesday 3:00 PM

Delete OK Cancel

Figure 20 Edit Alert page when you want to edit an alert

15.3 Delete Alerts

To delete your alerts,

1. Click the **LIBRARY** tab to display the library ribbon
2. On the ribbon, click **Alert Me**
3. SharePoint will display a drop down
4. From the drop down, click **Manage My Alerts**

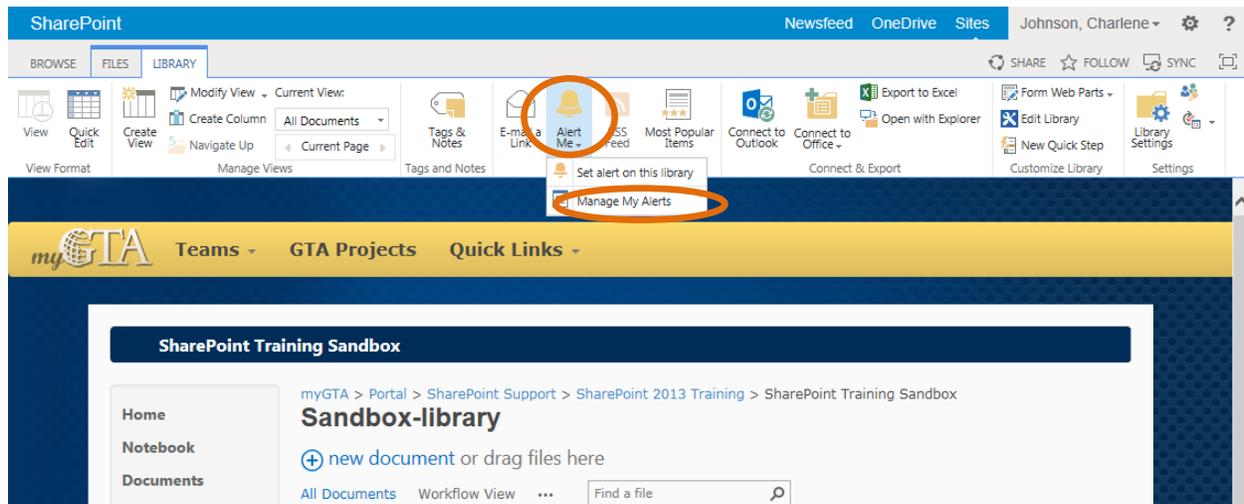


Figure 20 Library ribbon when you want to manage alerts

5. SharePoint will display **My Alerts on this Site**
6. Click the box next to one or more alerts you want to delete
7. Click **Delete Selected Alerts** and SharePoint will delete the selected alerts

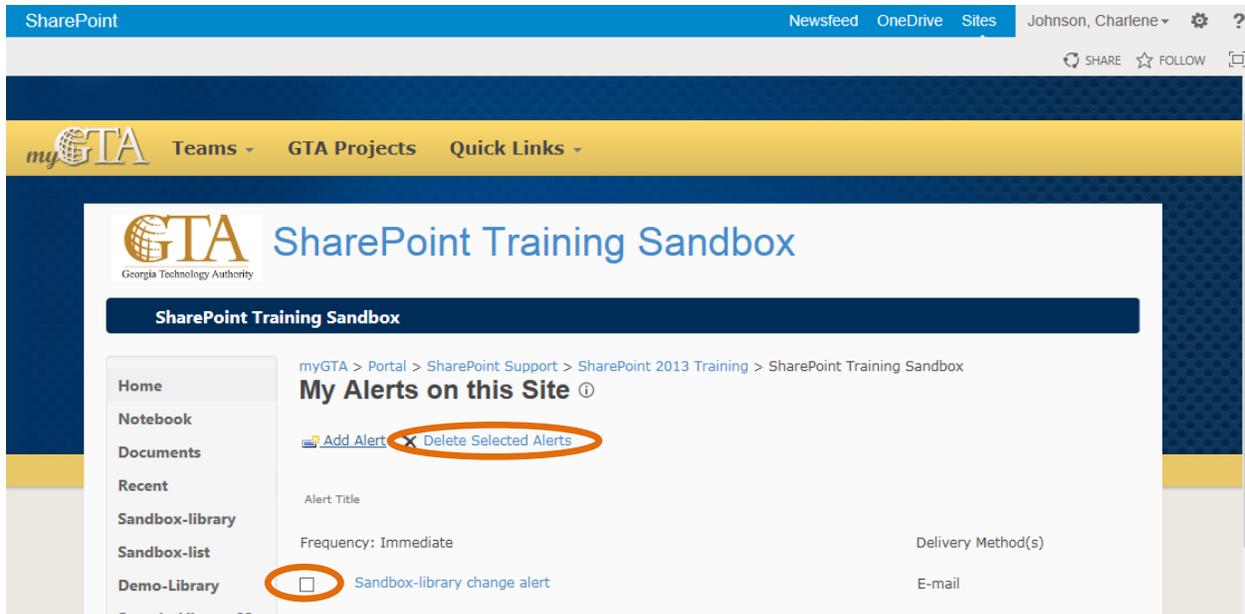


Figure 20 Check Box when you want to delete selected alerts

16.0 Apply Your Knowledge Exercises: Alerts

16.1 Set up an Alert

You can set an **Alert** on a library.

To set an **Alert**,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click on **Sample-Library-01** using **Quick Launch** and SharePoint will display the contents of the library
3. Click the **LIBRARY** tab to display the library ribbon
4. On the ribbon, click **Alert Me**
5. SharePoint will display a drop down
6. From the drop down, click **Set alert on this library**
7. SharePoint will display the **New Alert** box
8. Enter the information for the **New Alert** including:
 - a. **Alert Title**
 - b. **Send Alerts To** (enter your email address)

- c. **Delivery Method = E-mail**
 - d. **Change Type = Items are deleted**
 - e. **When to Send Alerts = Send notification immediately**
9. Then click **OK**
 10. SharePoint will send email notification that the **alert has successfully been added**
 11. Then a few assigned students will delete a document from the library and everyone will receive notification

16.2 Delete an Alert

You delete an **Alert** on a library.

To set an **Alert**,

1. Navigate to:
myGTA > Teams > Portal > SharePoint Support > SharePoint 2013 Training > SharePoint Student Lab
2. Click on **Sample-Library-01** using **Quick Launch** and SharePoint will display the contents of the library
3. Click the **LIBRARY** tab to display the library ribbon
4. On the ribbon, click **Alert Me**
5. SharePoint will display a drop down
6. From the drop down, click **Manage My Alerts**
7. SharePoint will display **My Alerts on this Site**
8. Click the box next to your **Alert**
9. Click **Delete Selected Alerts**
10. SharePoint will display a pop up: **Are you sure you want to delete the selected alerts?**
11. Click **OK** to confirm the delete and SharePoint will delete the Alert