



SharePoint Instruction Guide

SharePoint Lists - Document Libraries and Automation

INTRODUCTION

The purpose of these instructions is to accommodate a need to display many documents AUTOMATICALLY on a SharePoint website. Using the below methods, an administrator (or even end user) can set up a document library in various ways that will enable a "filtered view" into that document library, automating the adding or the updating links to documents.

Another document on SharePoint lists can be found at:

<http://www.pacounties.org/TechnologyServices/WebProgram/Documents/Creating%20and%20Using%20Lists.pdf> which talks more generally about the creation of lists and views.

This document is purposed specifically for documents and viewing those on pages.

This document has three sections, described below.

1. [Setting up list views "on the fly" on a page](#): Note this option does not allow for easy "grouping options." If you want to "group documents" based on date, or a type, you HAVE to use the instructions for using metadata!
2. [Pre-configuring a view of a list to use when building a page](#) (same instructions as above, without metadata the grouping benefit is not easy to achieve.)
3. [Using metadata in a list, in conjunction with a view, to sort out information in a document library. \(This method replaces using "folders"\)](#)

Note: These instructions do assume you know basics of how to create a page and upload a document. These also assume you understand the use of web parts to the degree that you can move them from zone to zone, and how to edit each web part.

TERMINOLOGY

- **Document Library:** The area to where your documents are stored in SharePoint.
- **List:** Any document library, image library, calendar, etc. in SharePoint.
- **Metadata:** Information about information (descriptors or keywords about your document.)
- **Document Web part:** The web part that you use to apply a "view" to your web page.

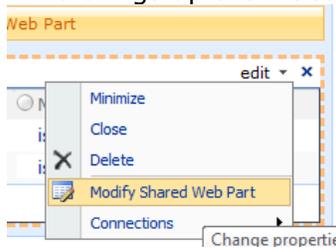
In the instructions to follow, the example will be referring to a document library type of list. However, these instructions can be applied to any type of list you want to add to the page.

SETTING UP LIST VIEWS "ON THE FLY" ON A PAGE

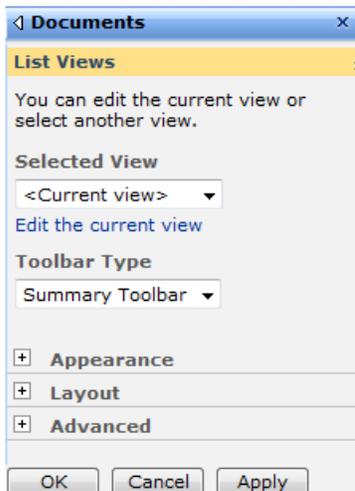
1. Login to the website.
2. Create a page.
3. On the webpage, click on **Add a Web Part**.
4. Select the documents library to add it to the page (or whatever list you are adding to a page)



5. Click on **Edit, Modify Shared Web Part**.
6. This brings up the **Documents** panel to where you can make all your changes.



7. Click on **Edit the current view**



IMPORTANT: Steps below (8 through 14) are IDENTICAL to that of creating a view inside lists settings!

8. Identify what **columns you want displayed** on your view by placing a checkmark in the box beside the column. You may also select the order of the columns with the numbering on the right hand side of the column names.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Name (linked to document)	2
<input checked="" type="checkbox"/>	Modified by	3
<input type="checkbox"/>	Check In Comment	4
<input type="checkbox"/>	Checked Out To	5
<input type="checkbox"/>	Content Type	6
<input type="checkbox"/>	Copy Source	7
<input type="checkbox"/>	Created	8
<input type="checkbox"/>	Created by	9
<input type="checkbox"/>	Edit (link to edit item)	10
<input type="checkbox"/>	File Size	11
<input type="checkbox"/>	ID	12
<input type="checkbox"/>	Modified	13
<input type="checkbox"/>	Name (for use in forms)	14
<input type="checkbox"/>	Name (linked to document with edit menu)	15
<input type="checkbox"/>	Scheduling End Date	16
<input type="checkbox"/>	Scheduling Start Date	17
<input type="checkbox"/>	Title	18
<input type="checkbox"/>	Version	19

9. You then want to select how you want to **Sort** the information in the library. Note the following:

- You may have two **sort by** settings
- If may select ascending or descending orders
- **You may need to determine naming conventions!!!**
 - For example: if you are sorting minutes, a good naming convention to use would be: *commissioner_minutes_20110228* so you would state purpose/department_type_yyyymmdd as a naming convention.
 - This allows very flexible use of filters and sorting options!!
 - If you use naming conventions for the name, you may then use **user friendly** text as the document **Title** which can be the column to display (or vise-versa as you cannot have a "Title" used with a link to that document, the icon for the document becomes the link instead. If you want the user to click on the name to link to the document, you would use the naming convention in the title for sorting/filtering reasons.

First sort by the column:

Modified

Show items in ascending order (A, B, C, or 1, 2, 3)

Show items in descending order (C, B, A, or 3, 2, 1)

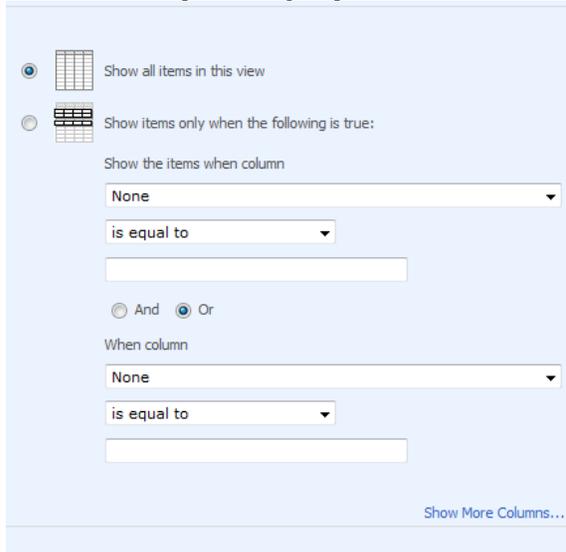
Then sort by the column:

None

Show items in ascending order (A, B, C, or 1, 2, 3)

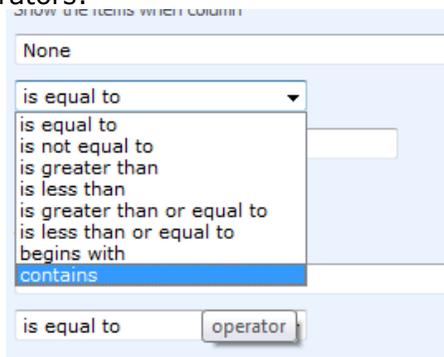
Show items in descending order (C, B, A, or 3, 2, 1)

10. Set up any filters. This is one of the most important steps as it controls what documents you display.



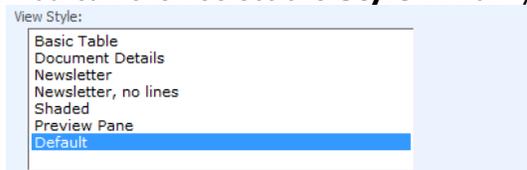
A few notes on Filters.

- You select **Show items only when the following is true** to filter.
- You can set up multiple filters.
- You can select filters to exclude or include information based on the following operators:



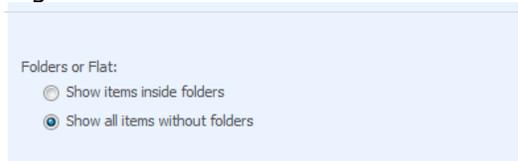
- **RECOMMENDATION: Contains** is a great one to use if you are using conventional file naming structures.
 - For example, if you wanted to only show commissioner minutes in the view, you would set up the filter to show only those files that contain *commissioner_minutes*.

11. You can then select the Style in how you want them displayed on the page.

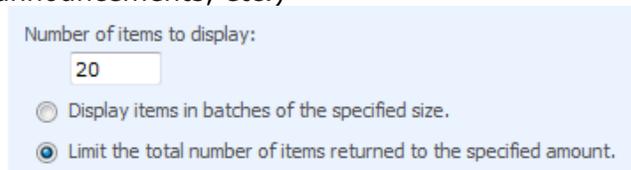


You can play with the styles to see which one is more appropriate for the document view you are creating.

12. If you have selected to use the “folder” method in organizing your information verses using Metadata, you can select whether to ignore folders. (Otherwise, the information is displayed with the folders listed; which is another way you can display something in an organized manner.

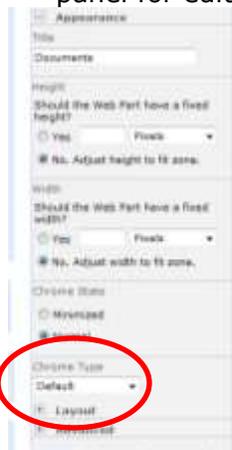


13. You may also select to limit the number of items in a list (helpful when using for announcements, etc.)

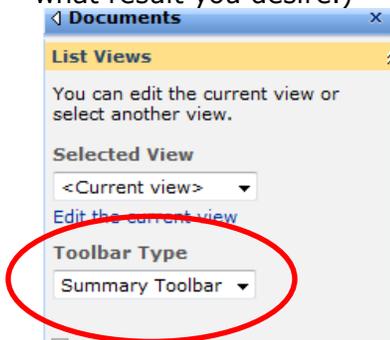


14. Once you are done with your view settings, click **OK**.

15. Set the documents folder to not display the title, by clicking on **Appearance** (while the panel for editing the web part is still open.) Change **Chrome Type** to **None**.



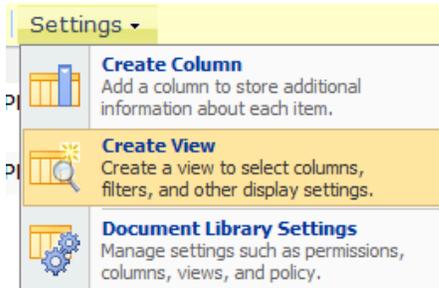
16. Lastly, set the **Toolbar type** to Summary or None (you will have to play with this to see what result you desire.)



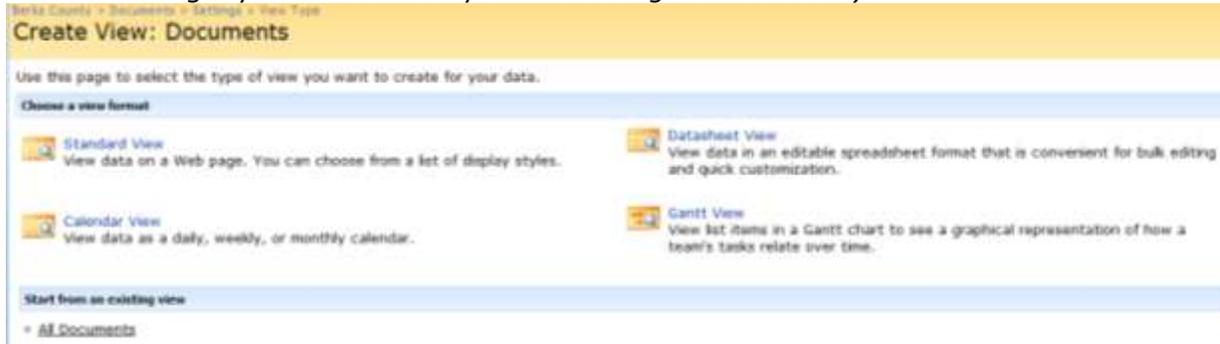
17. Click **Ok**
18. Publish your page.

PRE-CONFIGURING A VIEW OF A LIST TO USE WHEN BUILDING A PAGE

1. Login to the website.
2. Click on **Site Actions -> View All Site Content** to go to the list where you want to create the view.
3. Find the list and click to enter that list.
4. Click on **Settings -> Create View** (You may also click on **Document Library settings**, then scroll to the bottom of that window to **Create View.**)



5. Select either an **existing view** or a **previous view** (if there are filter settings that are similar but slightly easier to modify than creating from scratch.)



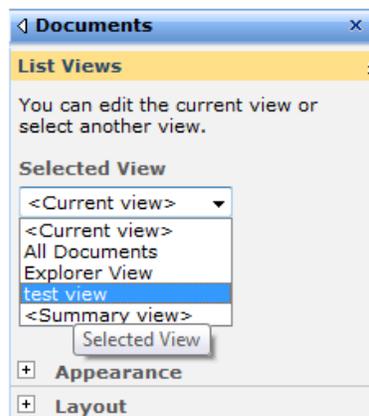
For example: If you previously created a view that includes, a sort by name (or Title) in descending order (if date driven with most recent on top) then has a filter of "contains" operator, commissioner_minutes_2011, you can use this view and change just the filter to create one for either prior or future year views by changing the commissioner_minutes_2011 to commissioner_minutes_2012, etc.)

If you are creating a view from scratch, in this case, just select **All Documents**.

6. This brings up the **same windows and instructions** above in numbers **8 – 14** beginning on page 3 **with the exception that you have to name your view. Name it according to the page/purpose for which it exists, for example, "2011 Commissioner Minutes"** You can leave the "Create Public View" as the default selection.



7. Once you have your view created, you add it to a page.
8. Create your page, add the web part.
9. Once you add the Web part, you need to select **edit -> Modify Shared Web Part**.
10. Select the view you created



11. Change the **Toolbar type** and the **Chrome Type** (under Appearance)
12. Click **Ok**
13. **Publish** your page.

IMPORTANT: If you change a “preconfigured view” you MUST go back to the page and edit the web part and RESELECT the view and change the toolbar type once again.

USING METADATA IN A LIST

Metadata can be used to organize and classify information. This can improve search and user interaction with your information. It is the new way in organizing information (moving away from using “folders.”)

Classification of information should be kept simple and should be enterprise based and can be used in conjunction with naming conventions. For example, if you would like information organized by year, that could be one of the metadata columns you create/use.

The following are examples of minute’s metadata where each department is its own site (so you do not have to categorize by department, or else that would too be a metadata column.)

- Examples:
 - 1st Metadata Column Name = Year
 - 2010
 - 2011
 - 2012
 - 2nd Metadata Column Name = Month
 - Would list them as such or they will not be able to be sorted accordingly.
 - (1) 01-January
 - (2) 02-February
 - (3) 03-March
 - (4) Etc.
 - (1) Etc...

You can use some of the metadata already in SharePoint (created, modified, etc.) to sort, filter, etc.

However, if you need to make custom columns to contain this information, see the instructions for "[SharePoint Guide - Instructions Creating a Custom List](#)" and refer to page 5, steps 17 through 21.

These instructions also have information on working with list views!

You will have to refer to the above document to create columns, as the following instructions just ties together the steps needed to incorporate metadata into your lists.

1. Determine what metadata makes sense for the list you are using.
2. Create the columns in your list (choice columns are great for metadata as the user will not have a choice in adding their "own" classification of information.)
3. Create a view for your list, using your metadata fields where appropriate.
4. Add your list to a page.
5. Edit the web part for your list to select the view you created.
6. Publish your page.

IMPORTANT: If you change a "preconfigured view" you MUST go back to the page and edit the web part and RESELECT the view and change the toolbar type once again.

NOTE: You may also use the Content Query Web Part with some coding to view items in a list. This takes some expertise and requires that the fields in the list be determined by SharePoint as "Site Columns." An example of this web part is throughout the www.pacounties.org website. At this point, CCAP would require custom request of training, as it will require significant hours against the SLA to be used to assist users with this type of functionality.

END RESULT / GOAL OF USING THIS FEATURE

The end result of setting up this process can be that an end user only has to upload (and classify a document if using metadata) – keeping in mind of naming conventions and the information will automatically show on the appropriate page where that view has been applied for that type of document.