

Transform the way you organise and find your files

Why Can't I Find My Files?

"If you've ever asked, 'Why can't I find my files in SharePoint?'—you're not alone."

- ❏ Custom views let you change how you see files without moving or copying anything – making your SharePoint library feel more organised and useful.

One of the **biggest gaps** in SharePoint training is understanding and using views in document libraries.

Most end users are never shown how to create or switch views, yet this simple feature is one of the **easiest ways to organise** and actually find your files fast.

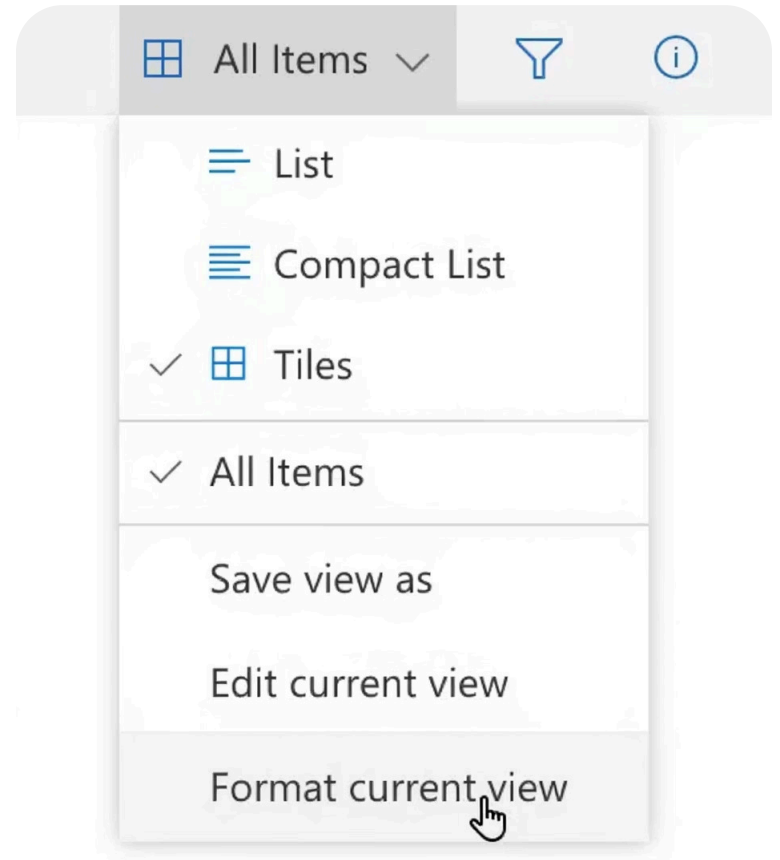
What Are Custom Views?

Custom views in SharePoint let you **change how you see files** in a document library so that the most important ones are easier to find.

With custom views, you can:

- Sort files by any column
- Filter to show only what you need
- Group related files together
- Show or hide specific columns

It's a quick way to make your SharePoint library feel more organised and useful for your everyday work.



View #1: Flat View (No Folders)

"If I'm using folders, I always build a flat view."

Even if you're working with folders, you can still make things easier to navigate by creating a view that shows **all files**—no matter which folder they're in.

Match each top-level folder to a value in a metadata column. So, if someone uploads a file into a folder called "Marketing," the Function or Department column is set to "Marketing" too.



Benefits:

- Sort, filter, and group files across the entire library
- Get metadata benefits while keeping folder structure

The screenshot shows a 'Documents' library view with a flat list of files. The columns are: Name, Document Type, Topic, and Modified. The files are listed with their respective icons, document types, topics, and modification times.

Name	Document Type	Topic	Modified
Document Type Term Set.csv	Spreadsheet	Analytics	June 12
HR Term Set.xlsx	Spreadsheet	Analytics	4 minutes ago
Event Plan.docx	Template	Digital Downloads	June 12
Website Statistic June 2025.xlsx	Spreadsheet	Analytics	3 minutes ago
Website Statistics May 2025.csv	Spreadsheet	Analytics	3 minutes ago
Information_Management_Governance_Fram...	Procedure	Toolkits	7 minutes ago
IMG_Framework.docx	Form	Toolkits	7 minutes ago
IA Best Practices.pdf	Guideline	Digital Downloads	2 minutes ago
Module 1 - SharePoint Document Chaos.pdf	Module	Courses	About a minute ago
Metadata Analysis.xlsx	Spreadsheet	Analytics	About a minute ago
Term Set Template.xlsx	Template	Digital Downloads	About a minute ago

View #2: Auto-Tagged by Folder View

"There's nothing worse than untagged files when you're filtering."

Make metadata apply automatically using folder-level default values. For example, if someone uploads a file into the Marketing folder, the Function column is automatically set to "Marketing."

No one needs to manually tag the file—and your views and filters work exactly as they should.



How to set it up:

1. Go to Library Settings
2. Select "Column default value settings"
3. Assign a default value for each folder

View #3: 'My View' - Your Personal View

"I always create a view called 'My View'—it's clean, sorted how I like it, and I can find it fast."

Create a personalised view that shows exactly what you need to see when working in SharePoint.

Whether you want documents sorted by modified date, grouped by document type, or filtered to show only your team's content—this is your view.

Create it, name it something obvious and pin it as your default.

Customise Your View With:

Custom sorting by any column

Filters for relevant content

Grouping by document type or category

Only the columns you need to see

View #4: Modified by Me or My Team - Last 30 Days

"I use this view to keep focus on what matters."

Filter your content to show only files that have been updated in the last 30 days and were modified by you or your team.

It's ideal for staying across recent activity without getting lost in updates from the entire organisation.

How to set it up:

1. Filter for Modified Date: Modified is greater than [Today]-30
2. Filter for Modified By is equal to [Me] or
3. Modified By equal to [Team Members]

View #5: Needs Attention/Untagged Files

"This is one of the most underrated but valuable views!"

Especially create them in libraries that rely on metadata.

It filters on items where a key metadata item is [empty]. helping you spot documents that were uploaded without adding metadata.

Fix these issues before they become bigger problems with filtering, sorting and searching.

How to set it up:

1. Create a new view called "Needs Attention"
2. Add filter: [Important Metadata Column] is empty
3. Consider adding a highlighted format on this column so that these missing fields stand out
4. Check this view regularly to maintain library quality

Bonus Views You Might Love

Beyond the essential five, here are some additional views that can make your SharePoint experience better:

1 By Document Type

Group or filter by 'Policy', 'Template', 'Procedure', etc. to quickly find specific document categories.

2 Created By You

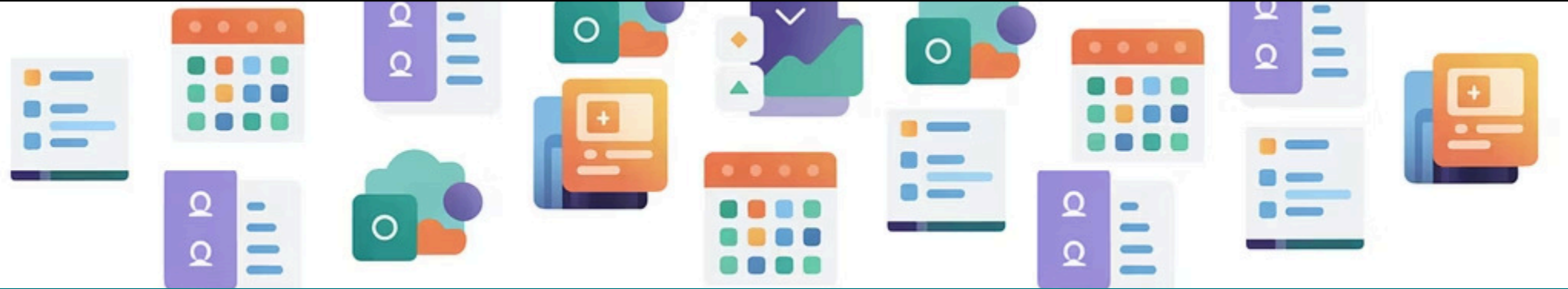
Filter to "Created by [Me]" to find your own uploads fast, especially useful in collaborative libraries.

3 Approaching Review Date

If using metadata or retention columns, set up a view to show content coming up for review or expiration.

4 Checked Out Files

Shows only items currently checked out—great for tracking bottlenecks and preventing lost work.



Transform Your SharePoint Experience

Start implementing these 5 essential views today and watch how quickly your team's SharePoint experience improves.

Next steps to get started:

- Choose one **document library** to improve first
- Create the "**Flat View**" to see everything at once
- Set up **auto-tagging** with folder default values
- Create your personalised "**My View**" as your default

Visit simplysharepoint.com for further tips and instructions on working with views.