

WORKING WITH VIEWS



A QUICK REFERENCE GUIDE FOR AKOYAGO

INTRODUCTION

This whitepaper will discuss working with Views in akoyaGO.

WHAT IS A VIEW?

A View is a filtered list of information containing information about any Entity in akoyaGO. A view consists of the following elements:

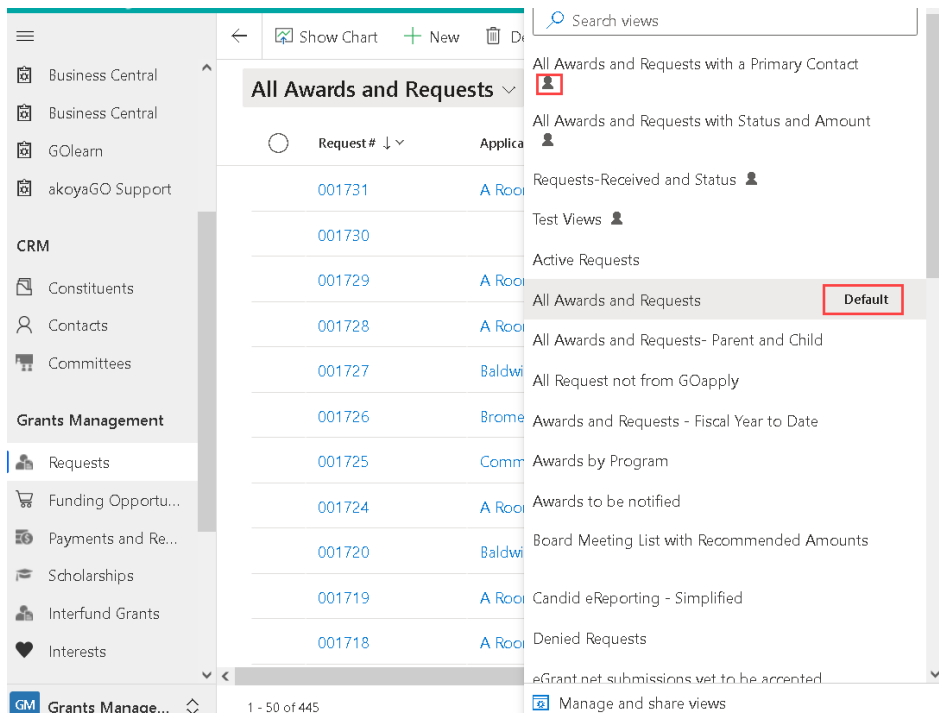
- The columns to display
- Default sorting options
- Filters to show rows that match specific criteria, if needed

There are two types of views: System and Personal (**My Views**).

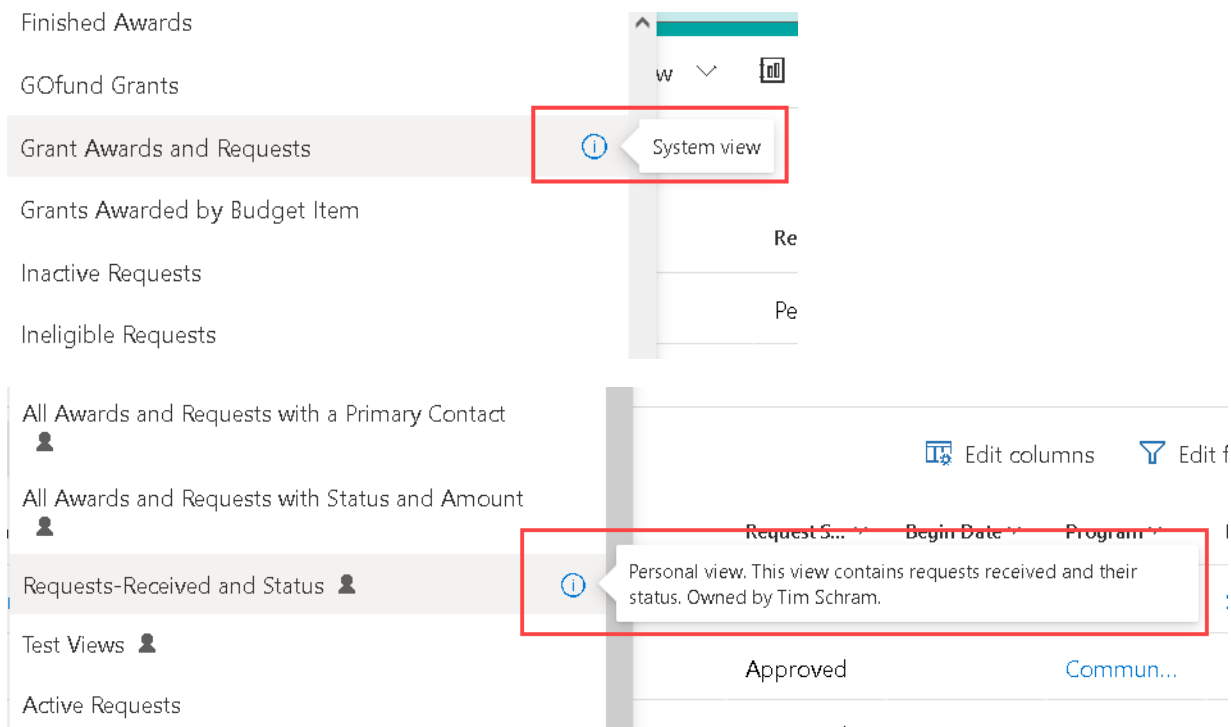
System Views are standard and available to all akoyaGO users. They are provided “out of the box” and are a part of your software solution and are found in any of the View dropdowns. The word **Default** will appear to the right of the View which is selected as the main view.

A Personal View is something you create. You will find an icon of a person's head next to Personal Views. Once you've created a Personal View, you can set it as a **Default**.

System views are views that are created by your administrator and shared with you. You typically can't modify them. However, you can create and manage personal views. Personal views are available to you only unless you share them.



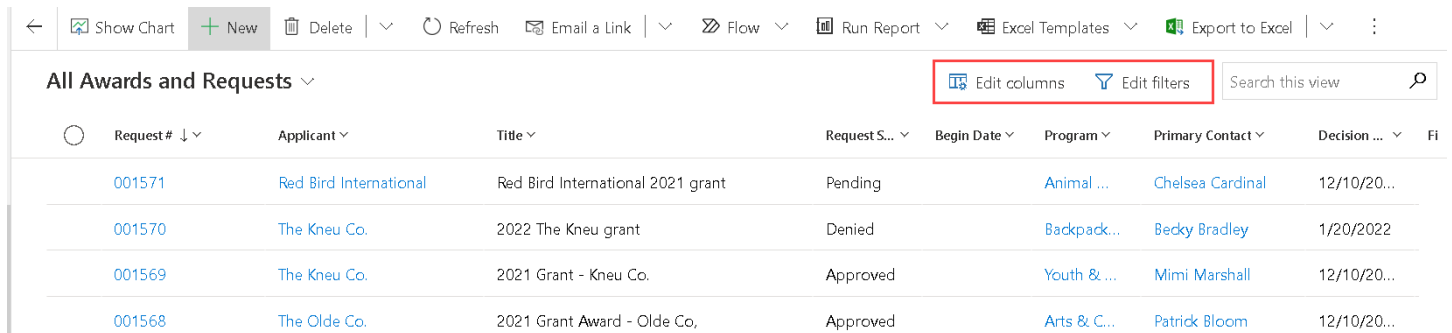
By hovering your mouse to the right of any View, you will see an information icon (Blue circle with an 'i' in it). This information icon will tell you if you if it's a System View or a Personal View. If it's a Personal View, it will show you the owner.



ENHANCED FILTERING

Under the Tool Bar in any View, you will see Edit Columns and Edit Filters. These are considered Enhanced Filtering tools.

- **Edit Columns** allows you to add or delete columns in a View.
- **Edit Filters** allows you to add or remove criteria so you can sort rows of information in a View.

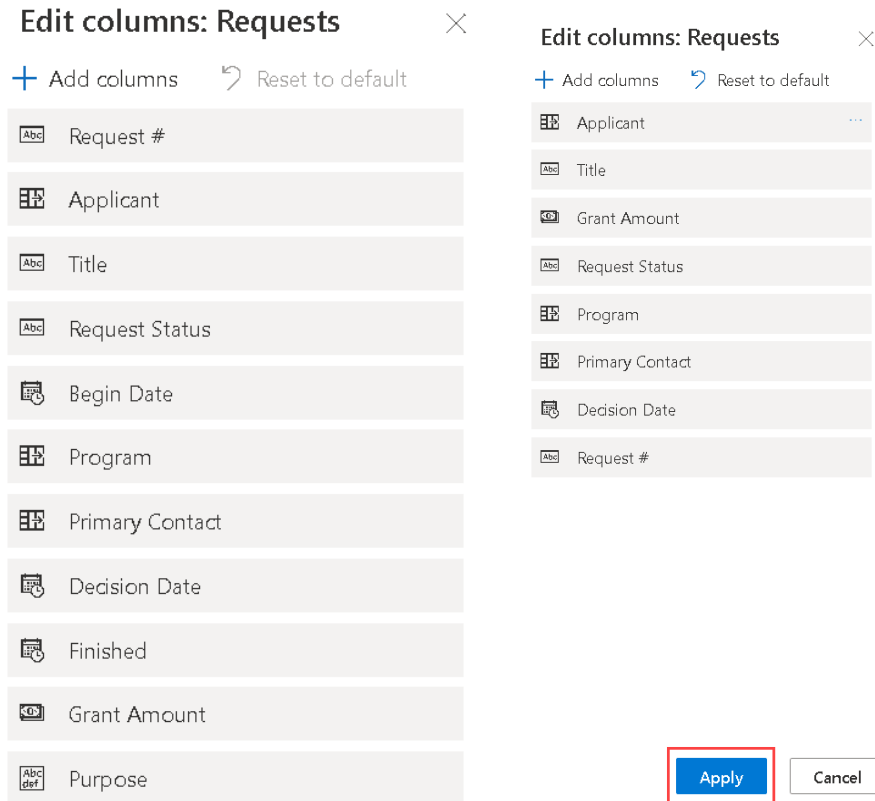


EDITING COLUMNS

When **Edit Columns** is selected, a list of columns appears. Select **Edit columns** to remove, reorder, or add columns to get a clearer view of your data. You can 'drag and drop' the column headings in any order. You can also delete out columns.

The following actions are available in the column editor:

- To remove a column, hover over the column name, select ..., and then select Remove.
- To change the order of the columns, select ..., and then select Move up or Move down. Or, drag the column to the desired position in the list.
- In the second example below, columns were rearranged, and some were deleted. When you are finished editing, select the **Apply** button.



You can also click on the **Add Columns** to show a list of additional columns to add. You can select the **Related** tab to find additional columns related to where you started working with your View. There is also a **Reset to Default** button so you can return your View to the original criteria.

- To add columns to the view, select Add columns, and then do one or more of the following:
 - Select a column from the default set of system columns in the table.
 - Select Default, then select All or Custom, and then select from the set of columns in the table.
 - Type a column name in the Search box to find a specific column, and then select it.



Add columns ✕

Request

Related

All ▾

123 ACT

Abc def Activities

? Age

Abc Application ID

Application Link Sent

Balance

Balance (Base)

✓ Balanced

Begin Date

Budget FY

- To add columns from other tables, select the **Related** tab. Expand the table that contains the column you want to add, and then select the column. When you're done adding columns, select **Close**.
- To undo changes to the view's columns at any time, select **Reset to default**.

EDITING FILTERING

Use the filter editor to view or change the query that underlies the data in the current view.

EDIT OR DELETE A CONDITION

- To change a condition, select the column, operator, or value and edit as needed.
- To remove a condition, select More commands (...) next to the row, and then select **Delete**.

Edit filters: Payments and Requirements ✕

 Reset to default

AND ▾

☐

Amount ▾

Is Greater than ▾

0

...

☐

Payment Status / Folio ▾

Contains data ▾

Delete

Make group

+ Add ▾

Apply

Cancel

ADD CONDITIONS

- To add one or more conditions, select **Add**.
- When you're finished editing the view filters, select **Apply** to see your changes on the grid page.

The following options are available when you add conditions in the filter editor:

A screenshot of a filter editor interface. At the top left, there is a grey button labeled 'AND' with a downward arrow. Below it, there are two filter conditions, each preceded by a checkbox. The first condition is 'Amount' (dropdown) 'Is Greater than' (dropdown) '0' (text input). The second condition is 'Payment Status / Folio' (dropdown) 'Contains data' (dropdown). Below these conditions is a red-bordered box containing a '+ Add' button with a dropdown arrow. The dropdown menu is open, showing four options: 'Add row' (with a plus icon), 'Add group' (with a list icon), and 'Add related entity' (with a table icon). There is also a '+ Add' button below the dropdown menu.

- To add a condition, select **Add Row**, and then select the criteria for your View.

A screenshot of the filter editor interface. It shows the same 'AND' button and two conditions as the previous screenshot. A third condition, 'Account' (dropdown) 'Begins with' (dropdown) 'A' (text input), has been added and is highlighted with a red border. Below the conditions is a '+ Add' button.

- To add a group of conditions, select Add group. You can create multiple sub conditions and group them using AND and OR operators to create an expression.

A screenshot of a 'Manage Dynamic List Members' dialog box. At the top, there is a 'Look for:' field with a red box around the word 'Contact' and a 'Use Saved View:' field with a dropdown arrow. Below this is a filter editor. It starts with an 'And' button. The first condition is 'Email Address' (dropdown) 'Contains data' (dropdown). Below this is a red-bordered box containing an 'Or' button. The 'Or' button has a dropdown arrow. Below the 'Or' button are two conditions, each preceded by a checkbox. The first condition is 'Address 1: State/Provi...' (dropdown) 'Equals' (dropdown) 'MN' (text input). The second condition is 'Address 1: State/Provi...' (dropdown) 'Equals' (dropdown) 'CO' (text input). Below these conditions is a '+ Add' button. Below the 'Or' button is another '+ Add' button.

Find

- To add a single condition to a group, select the condition checkbox, then select ..., and then select **Make group**.
- To separate a group of conditions, select the group's checkbox, then select ..., and then select **Ungroup**.

The screenshot shows a filter editor interface. At the top, there's a dropdown menu set to 'AND'. Below it, there are several filter conditions. One condition is highlighted with a red box: it has a checked checkbox, the text 'Or', and a dropdown arrow. To the right of this, a context menu is open, showing three options: 'Delete' (with a trash icon), 'Make group' (with a plus icon), and 'Ungroup' (with a minus icon). The 'Ungroup' option is highlighted with a red box. Below the highlighted condition, there are two more conditions: 'Address 1: State/Provi...' with 'Equals' and 'MN', and another 'Address 1: State/Provi...' with 'Equals' and 'CO'. At the bottom, there's a '+ Add' button.

- To add a condition based on a column in a related table, select **Add related entity**, and then select a table. **Contains Data** is the only condition that can be used with a related table in a view filter. Then, select the parameters for that related entity.

Edit filters: Events

Reset to default

The screenshot shows the same filter editor interface as before. The 'AND' dropdown is at the top. Below it, there's a '+ Add' button. A context menu is open, showing four options: 'Add row' (with a plus icon), 'Add group' (with a plus icon), 'Add related entity' (with a table icon), and 'Add' (with a plus icon). The 'Add related entity' option is highlighted with a red box. Below the highlighted option, there's a '+ Add' button.

Edit filters: Events

Reset to default

The screenshot shows the same filter editor interface as before. The 'AND' dropdown is at the top. Below it, there's a '+ Add' button. A context menu is open, showing four options: 'Add row' (with a plus icon), 'Add group' (with a plus icon), 'Add related entity' (with a table icon), and 'Add' (with a plus icon). The 'Add related entity' option is highlighted with a red box. Below the highlighted option, there's a '+ Add' button.

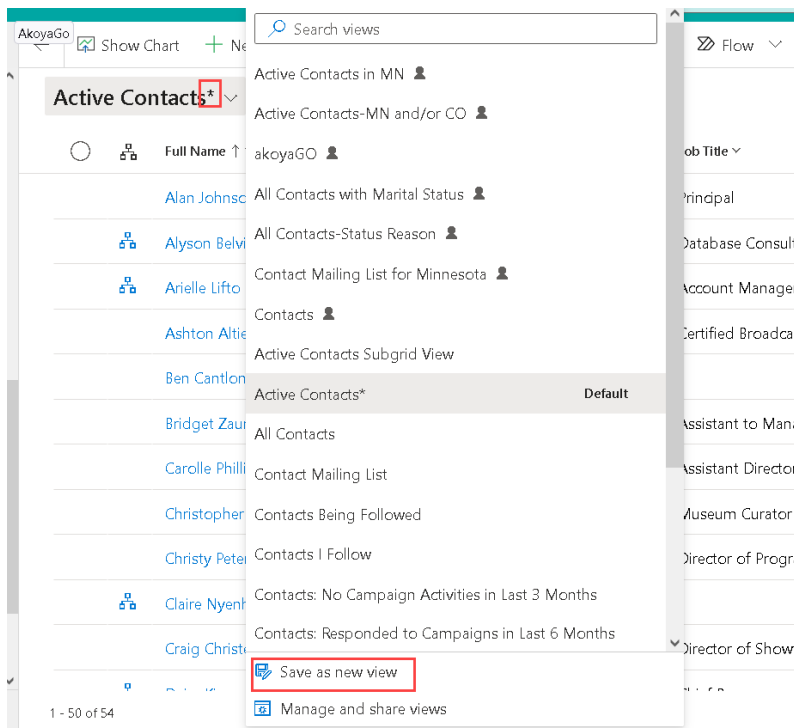
To undo changes to the view filter at any time, select **Reset to default** in the upper left-hand corner.

PERSONAL VIEWS

Once you've adjusted your columns and filtered rows, you need to save your View. After hitting the **Apply** button, you will be returned to the View on which you started. An asterisk (*) beside the view name indicates you edited the view and haven't saved it. If you switch to another view or leave the page, the view will revert to its original definition. To keep your changes and add the new view to the list of views available to you, be sure to save it.

SAVING YOUR EDITS AS A NEW VIEW

Once you've adjusted your columns and filtered rows, you need to save your View. After hitting the **Apply** button, you will be returned to the View on which you started. An asterisk (*) beside the view name indicates you edited the view and haven't saved it. If you switch to another view or leave the page, the view will revert to its original definition. To keep your changes and add the new view to the list of views available to you, be sure to save it.



To keep the original view, save your edited version as a new view with a different name. If you made changes to a view you don't have *Write* permission to, whether it's a system view or a personal view, then you can only **Save As New View**.

The next window will prompt you to enter a new **Name** and **Description** before you click on **Save**.

Note: If you want to keep the original view, be sure to give your edited view a different name. If you don't, your changes will *overwrite the existing view without confirmation*, even though you selected to save it as a new view.

Save as new view



The view is stored in the list of saved views

Name * **All Active Contacts in** ...

Description

Use this for a Marketing
Lists containing all Active
Contacts in MN or CO

Save

Cancel

CHANGING THE DEFAULT VIEW

The default view for a table is indicated by the **Default** label in the View selector. You can set a different view as your personal default.

In the following example, **Active Contacts** is set as the default. To change your default View to **All Active Contacts in MN or CO**:

- In the View selector, select **All Active Contacts in MN or CO** to apply the view to the grid page.
- Open the View selector again and select **Set As Default View**.
- To change your personal default view back to the original default view, select **Reset Default View** in the View selector.

Search views

Active Contacts in MN

All Active Contacts in MN or CO

All Contacts-Status Reason

Contact Mailing List for Minnesota

Contacts

Active Contacts **Default**

All Contacts

Contact Mailing List

Set as default view

Manage and share views

Search views

Active Contacts in MN

All Active Contacts in MN or CO Default

All Contacts-Status Reason

Contact Mailing List for Minnesota

Contacts

Active Contacts

All Contacts

Contact Mailing List

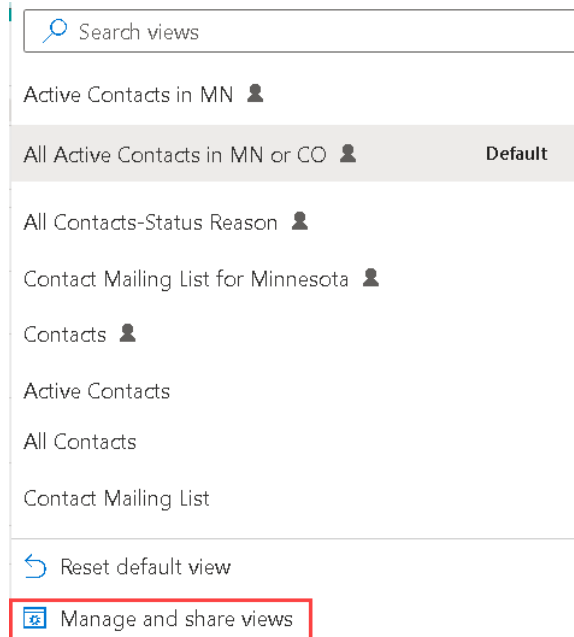
Reset default view

Manage and share views

MANAGING AND SHARING PERSONAL VIEWS

With the right permissions, you can share, assign, hide, rename, and delete views.

In the view selector, select **Manage and Share Views**.



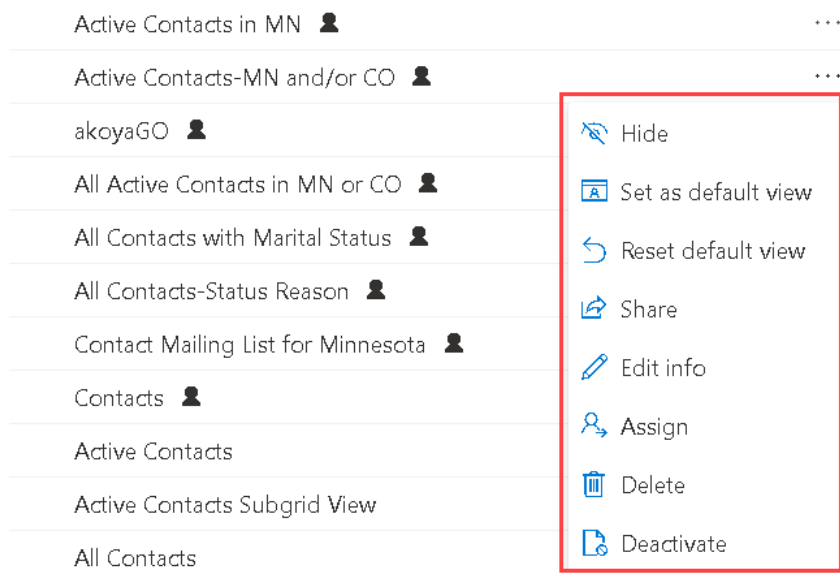
Select View commands (...) and then choose your option.

Manage and share views: Contacts

Share views with your organization and manage your view list by hiding, renaming, and deleting views. [Learn more](#)

Filter views

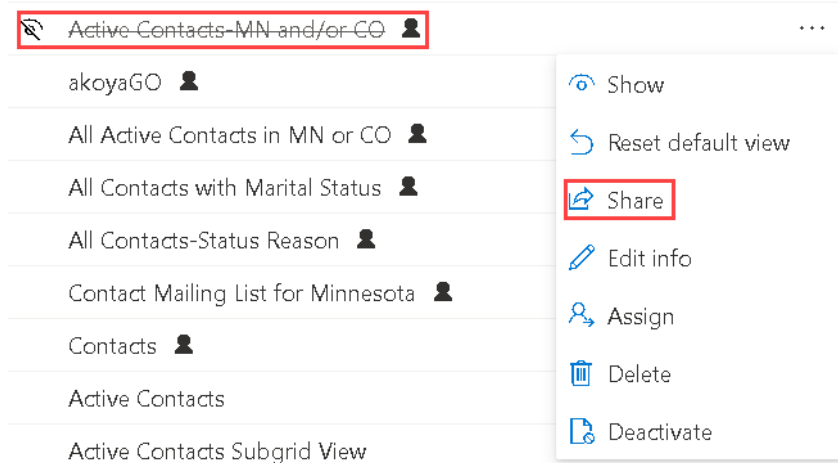
Sort by Personal before system, A to Z



SHARING A VIEW

Sharing a View allows other Users to use the View while you maintain ownership rights. Before you can share a personal view, it must be saved. To share a View, select a View and click on **Share**.

- In the view selector, select **Manage and Share Views**.
- Click on **Share**.



- **Add** as many Users or Teams using **Search**.

Share records

Manage who can see your record and how much access they get.

Changes made to all users or teams will be shared and options saved after clicking on the Share button.

Add user/team	
<input type="text" value="Claire"/>	Results from: Users Teams
Manage share access	
<div><div><div></div></div><div><div>GS</div><div>Gail Sullivan</div></div><div>×</div></div>	<div><div><div>Claire Nyenhuis</div><div>claire@akoyago.com</div><div>▼</div></div><div><div>+</div><div>New Record</div><div>Advanced lookup</div></div></div>
Select a person or group to assign their permission(s)	

- Select the User and then grant individual permissions: Read, Write, Delete, Assign, and/or Share. You can select one or more permissions per User.

Share records



Manage who can see your record and how much access they get.

Changes made to all users or teams will be shared and options saved after clicking on the Share button.

Add user/team

Manage share access

GS

Gail Sullivan

×

✓

CN

Claire Nyenhuis

×

Claire Nyenhuis

Grant this user or team access to this record by assigning them permissions

Permissions ⓘ

☒ Read

☒ Write

☐ Delete

☐ Append

☐ Append to

☐ Assign

☒ Share

Share

ASSIGNING A VIEW

Assigning ownership of the View to another User or Team in your organization can be done, but you give up all ownership rights. Assigning a View only appears on personal Views that you own. Before you can assign a personal View, it must be saved. To assign a View, select a View and click on **Assign**.

Active Contacts-MN and/or CO ⓘ

akoyaGO ⓘ

All Active Contacts in MN or CO ⓘ

All Contacts with Marital Status ⓘ

All Contacts-Status Reason ⓘ

Contact Mailing List for Minnesota ⓘ

Contacts ⓘ

Active Contacts

Active Contacts Subgrid View

Show

Reset default view

Share

Edit info

Assign

Delete

Deactivate

- In the view selector, select **Manage and Share Views**.
- Click on **Assign**.
- Select **Assign to User or Team**.
- Look up the User or Team and then select **Assign**.

Assign Saved View



You have selected 1 Saved View. To whom would you like to assign it?

Assign to

User or team

User or team



Gail Sullivan



Assign

Cancel

Remember: Once you have assigned a View to another user, you will not be able to edit or share it.
Best Practice: Before assigning a View, let the User or Team know they will be owners of that View.

CHANGE THE ORDER OF VIEWS IN THE VIEW SELECTOR

By default, the view selector lists views in two groups, personal views and system views, each ordered alphabetically. You can change the sort order within groups or remove the grouping entirely and order the entire list alphabetically.

- In the view selector, select Manage and share views.
- Change the view selector sort order, and then select Apply.

The following sorting options are available:

- Personal before system, A to Z: This is the default. Both groups are ordered alphabetically. Personal views appear above system views.
- System before personal, A to Z: Both groups are ordered alphabetically. System views appear above personal views.
- A to Z: The grouping is removed. All views (system and personal) are presented in alphabetical order.

Manage and share views: Contacts

Share views with your organization and manage your view list by hiding, renaming, and deleting views. [Learn more](#)

 Filter views

Sort by

Personal before system, A to Z

▼

✓ Personal before system, A to Z


System before personal, A to Z

A to Z

Ad ...

Ad ...

ak ...

All Active Contacts in MN or CO 

Default ...

HIDING VIEWS

There may be times when the You can hide Views in the View selector to personalize the list and reduce clutter. You should keep some things in mind:

- When you hide a View, it's hidden from that table's views.
- If the View is shared with you and other team members, hiding it only hides the View for you. It's not hidden for everyone else who has access to the View.
- You can hide your Personal Views by default. You can hide System Views only if the administrator has allowed it.
- You can't hide a table's Default View. If you want to hide the Default View, set another View as the Default first.
- You can't set a Hidden View as the Default View for a table.

To hide a View:










- In the View selector, select **Manage and Share Views**.
- Hover over the View and select **Hide**. Or you can select View commands (...) to the right of the View, and then select **Hide**.
- Select **Apply**.

Manage and share views: Contacts

Share views with your organization and manage your view list by hiding, renaming, and deleting views. [Learn more](#)

Filter views

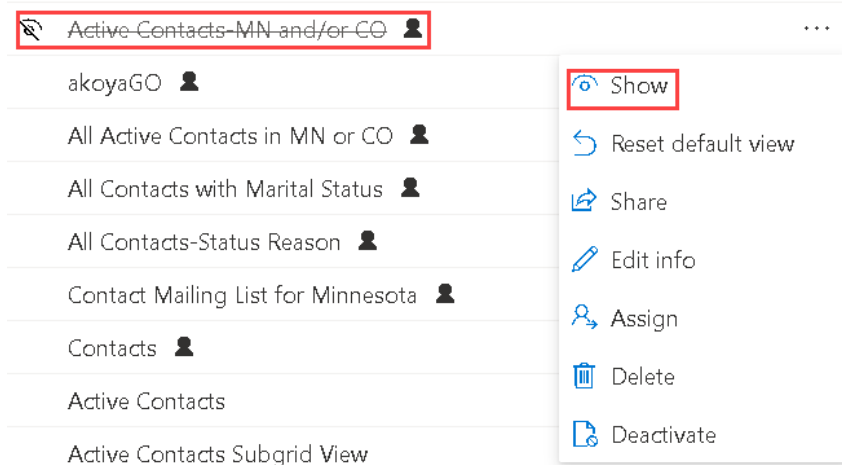
Sort by

Active Contacts in MN	...
 Active-Contacts-MN and/or CO	...
akoyaGO	...
All Active Contacts in MN or CO	 Hide
All Contacts with Marital Status	 Set as default view
All Contacts-Status Reason	 Reset default view
Contact Mailing List for Minnesota	 Share
Contacts	 Edit info
Active Contacts	 Assign
Active Contacts Subgrid View	 Delete
All Contacts	 Deactivate
Contact Mailing List	

To restore a Hidden View:

- In the View selector, select **Manage and Share Views**.

- Hover over the View and select **Show**. You can also select View commands (...) to the right of the View, and then select **Show**.
- Select Apply.



DEACTIVATING OR DELETING A VIEW

The best practice is to deactivate a view. You may want to reactivate it later and change criteria. Highlight the View and select **Deactivate**.

To delete a View, highlight the View and select **Delete**.

