# 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 is akoyaGO. A view consists of the following elements:

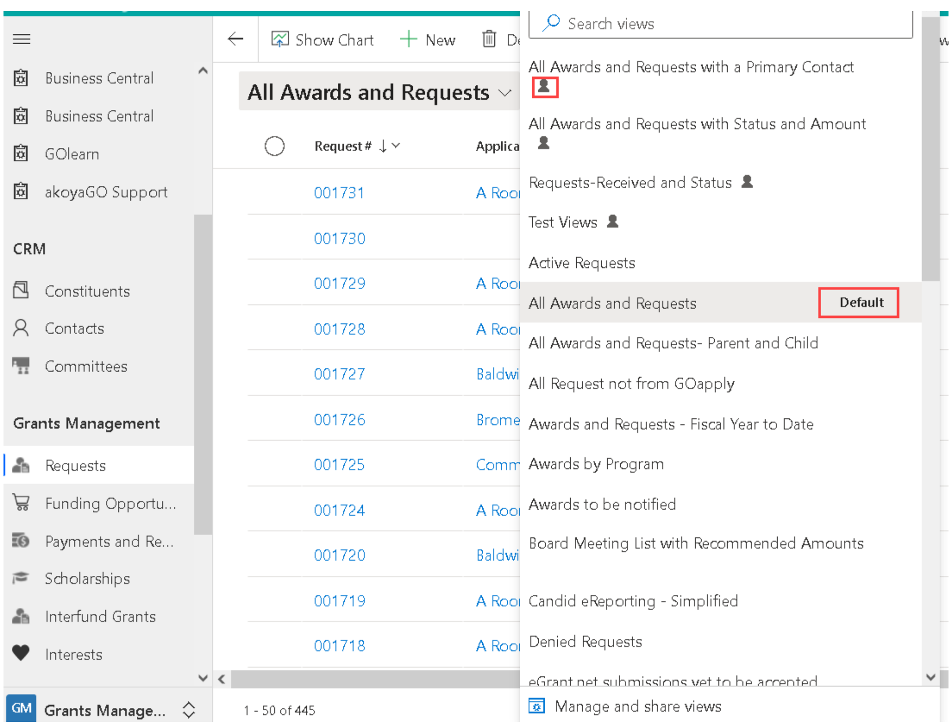
- The columns to display
- Default sorting options
- Filters to show rows that match specific criteria, if needed

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

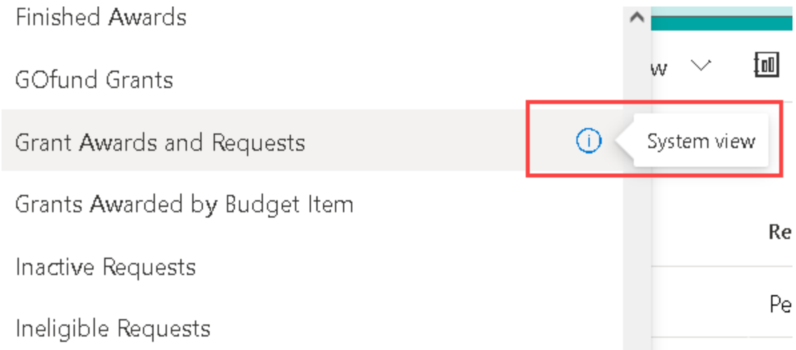
System Views are standard and available to all akoyaGO users. They are provided “out of the box” and a part of your software solution and are found in any of the View dropdowns. The word **Default** will appear to the right of the View which is selected as the main view.

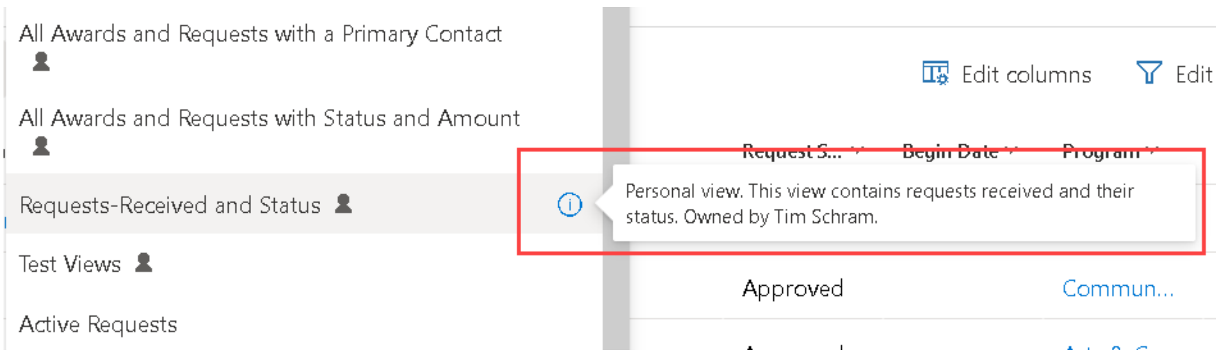
A Personal View is something you create. You will find an icon of a person’s head next to Personal Views. Once you’ve created a Personal View, you can set it as a **Default**.

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.

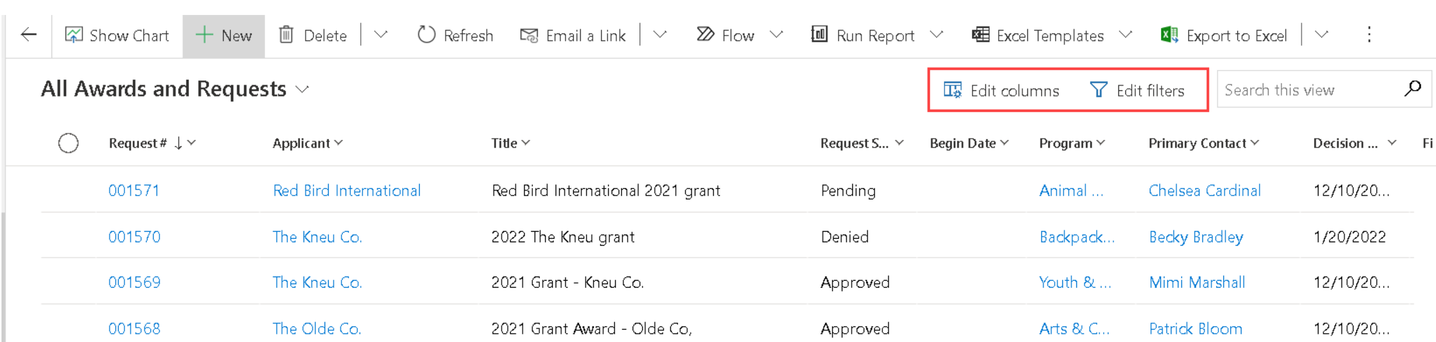



## ENHANCED FILTERING

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.

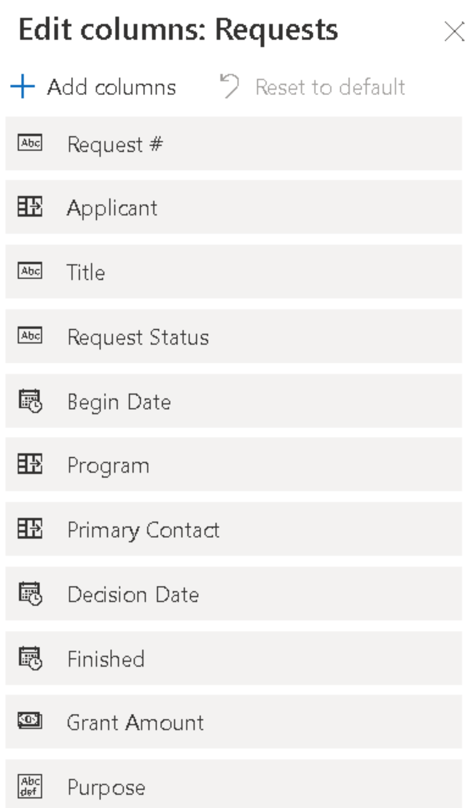


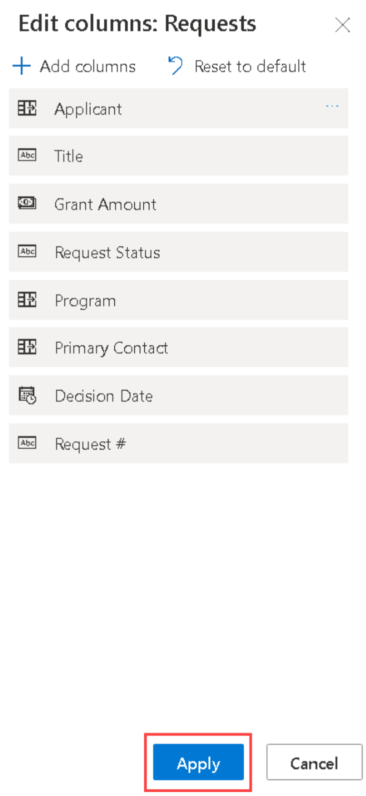

## EDITING COLUMNS

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:

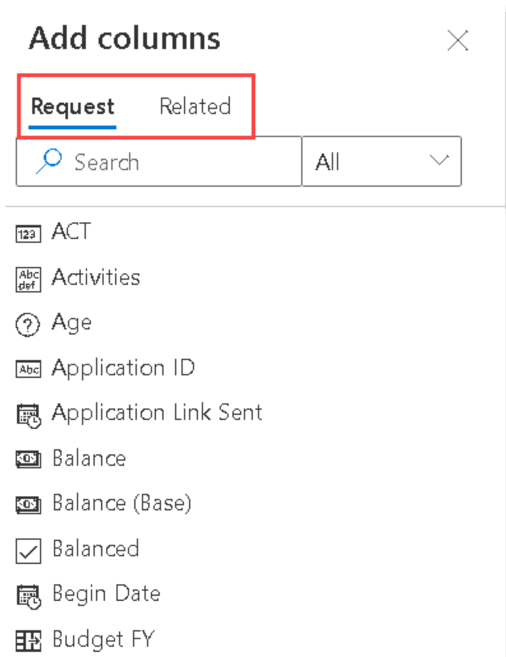
- To remove a column, hover over the column name, select …, and then select Remove.
- To change the order of the columns, select …, and then select Move up or Move down. Or, drag the column to the desired position in the list.
- In the second example below, columns were rearranged, and some were deleted.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



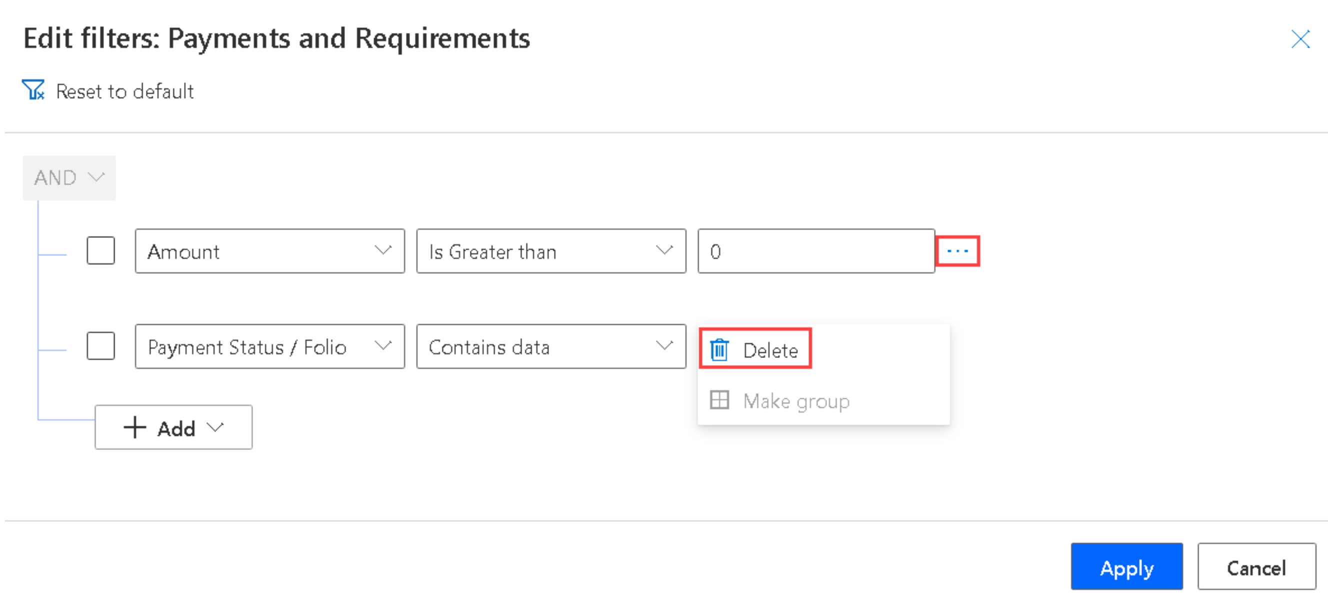

- To add columns from other tables, select the **Related** tab. Expand the table that contains the column you want to add, and then select the column. When you're done adding columns, select **Close**.
- To undo changes to the view's columns at any time, select **Reset to default**.

## 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

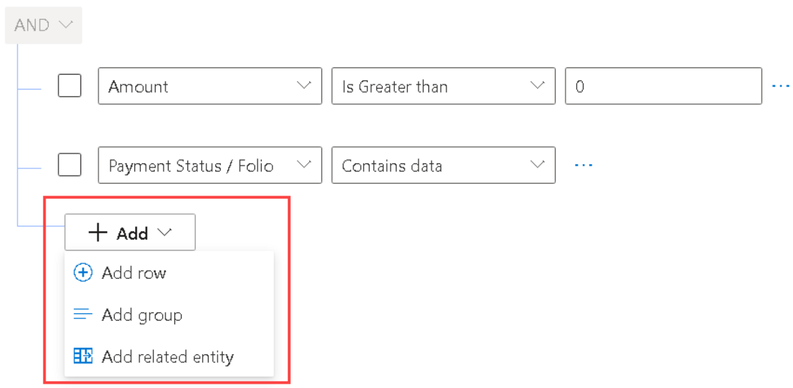
- To change a condition, select the column, operator, or value and edit as needed.
- To remove a condition, select More commands (**…**) next to the row, and then select **Delete**.



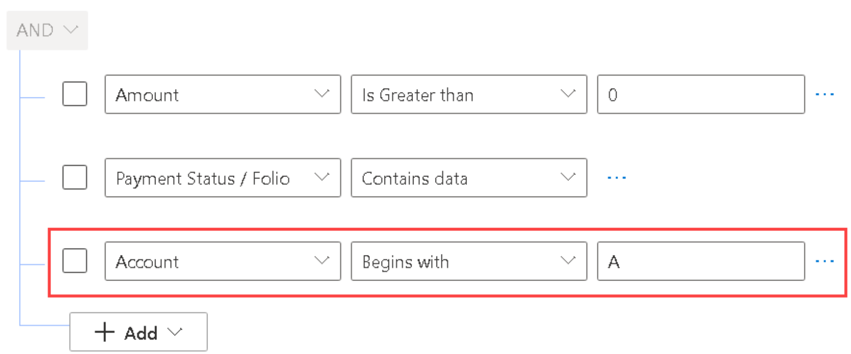
## ADD CONDITIONS

- 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.

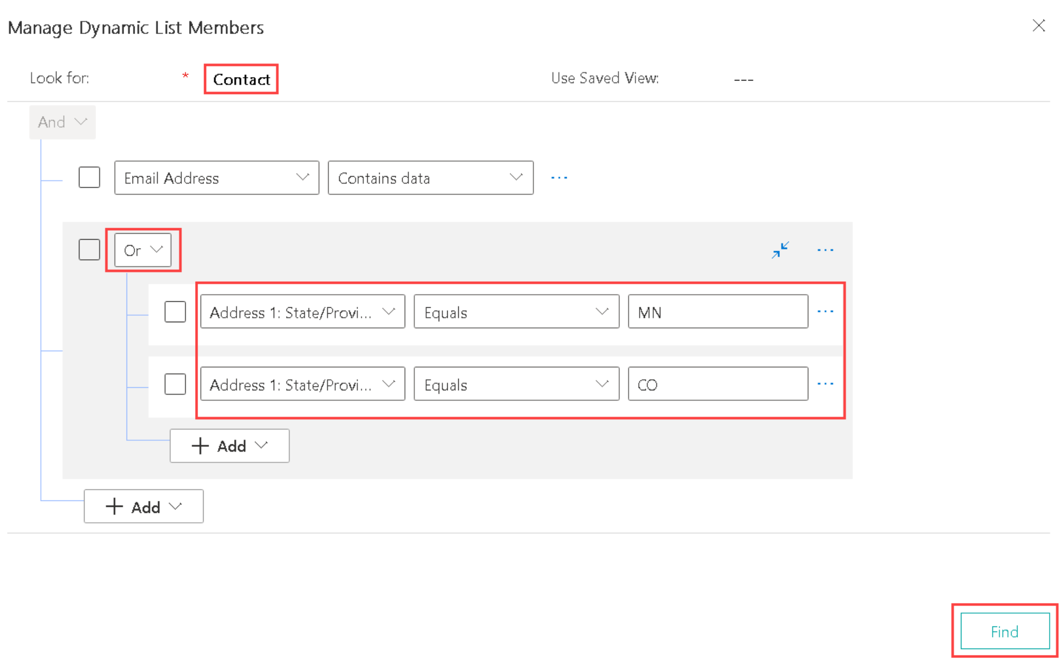
The following options are available when you add conditions in the filter editor:



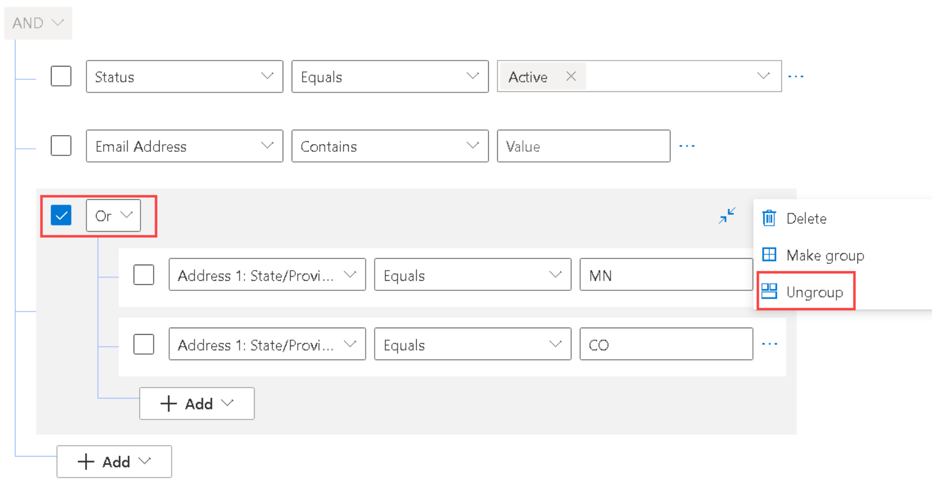

- To add a condition, select **Add Row**, and then select the criteria for your View.



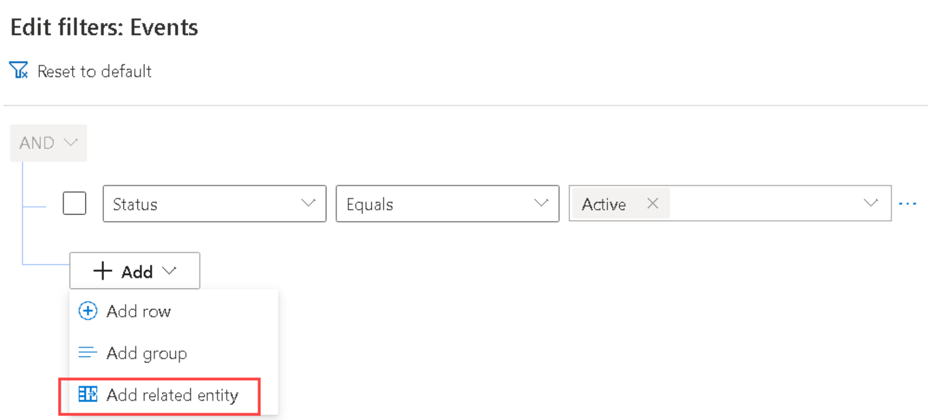

- To add a group of conditions, select Add group. You can create multiple sub conditions and group them using AND and OR operators to create an expression.

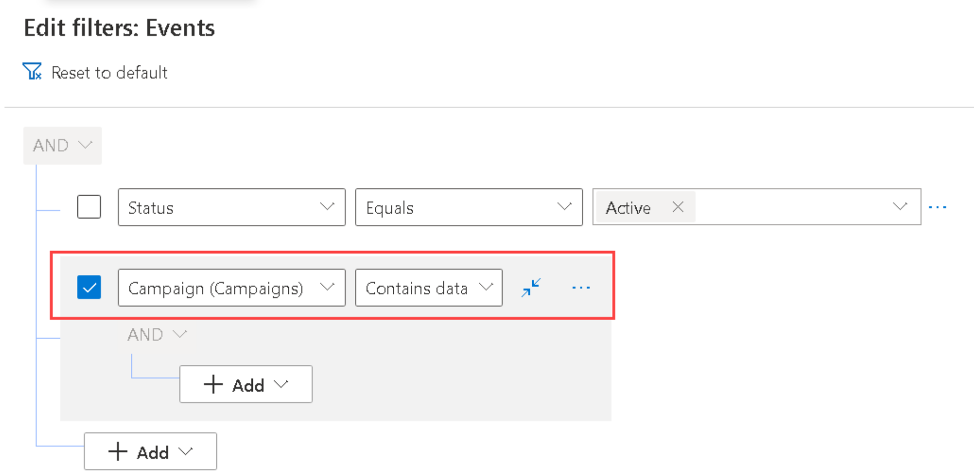


- To add a single condition to a group, select the condition checkbox, then select …, and then select Make group.
- To separate a group of conditions, select the group's checkbox, then select …, and then select Ungroup.




- 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.



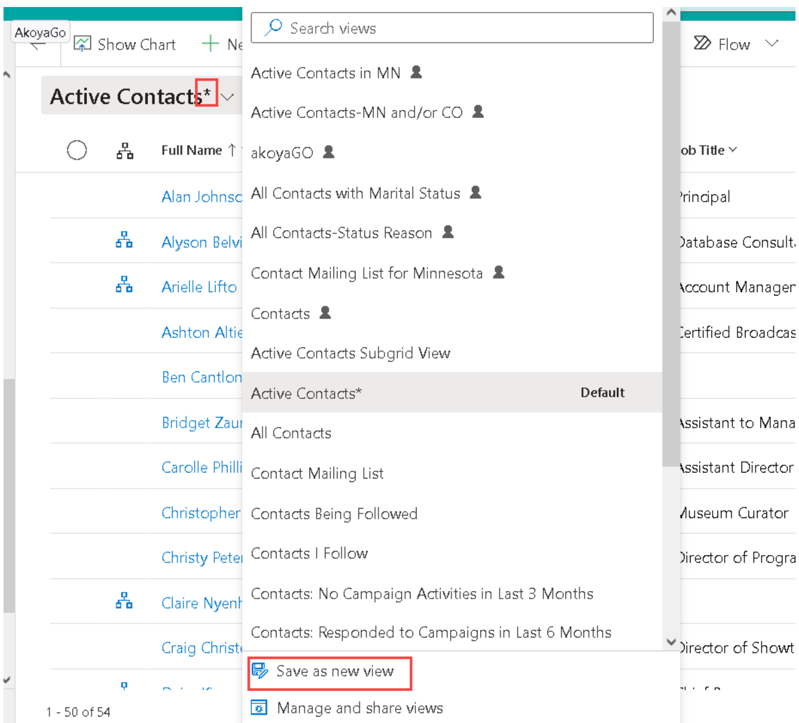

To undo changes to the view filter at any time, select **Reset to default** in the upper left-hand corner.

## 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

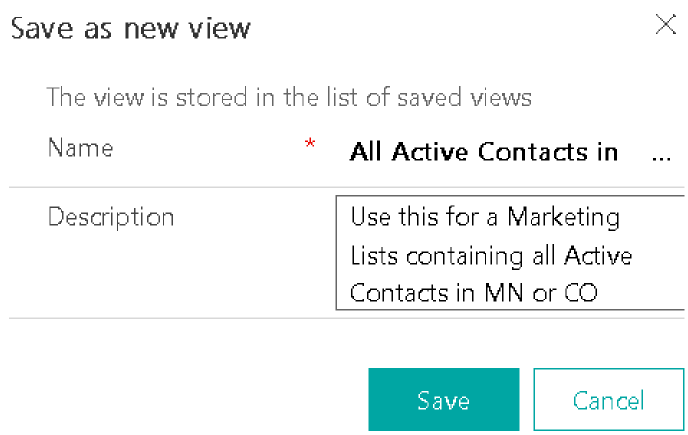
Once you've adjusted your columns and filtered rows, you need to save your View. After hitting the **Apply** button, you will be returned to the View on which you started. An asterisk (*****) beside the view name indicates you edited the view and haven't saved it. If you switch to another view or leave 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.

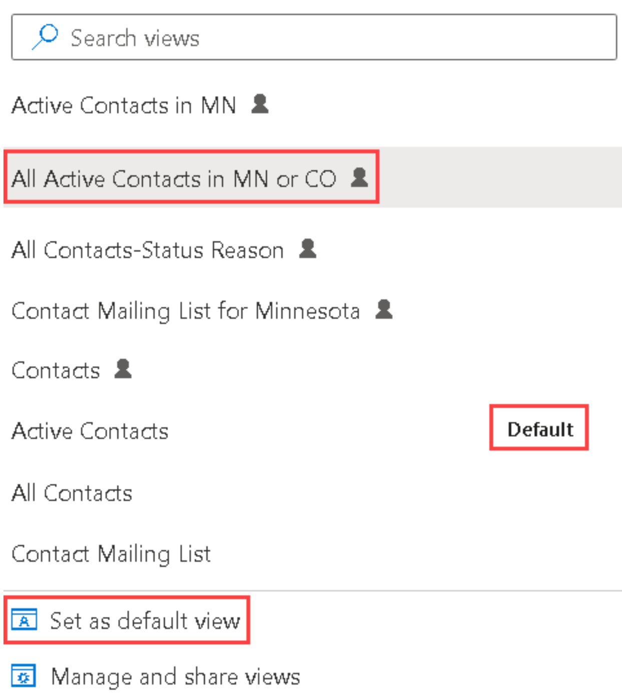


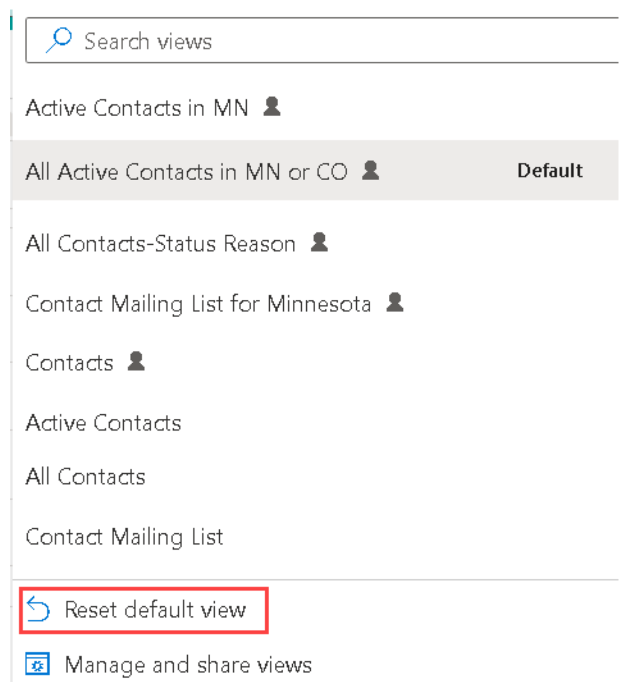

## CHANGING THE DEFAULT VIEW

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.

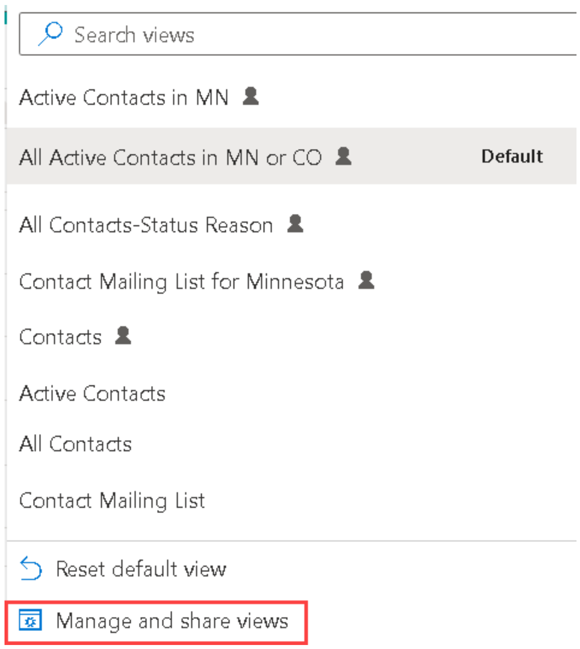


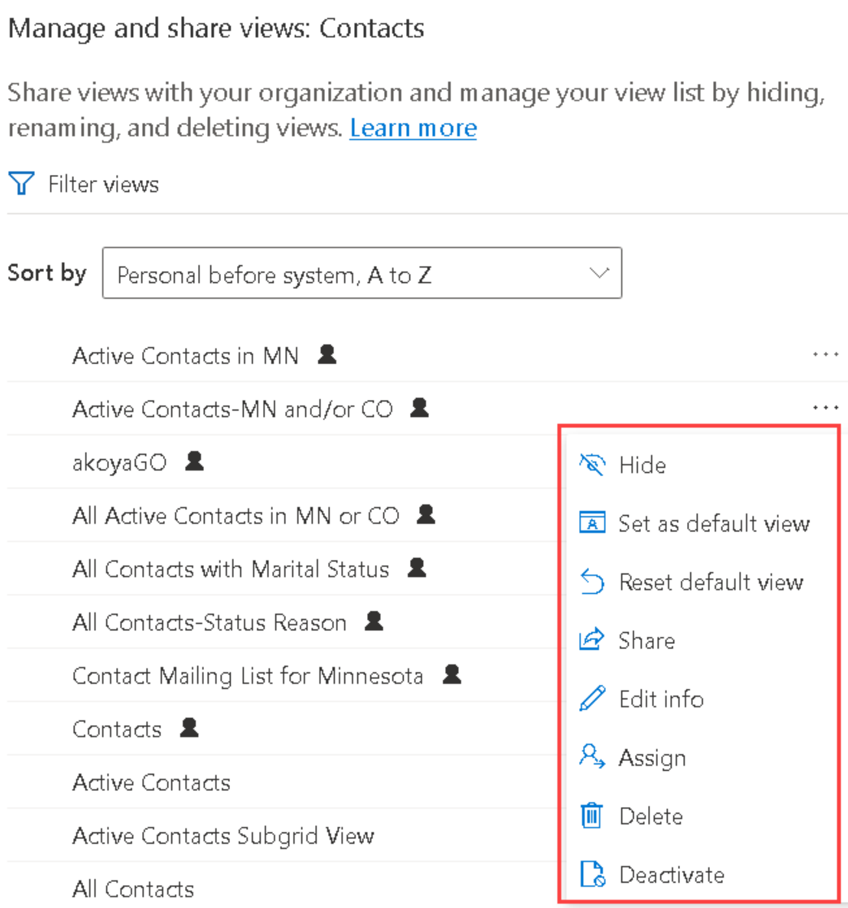
## MANAGING AND SHARING PERSONAL VIEWS

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

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



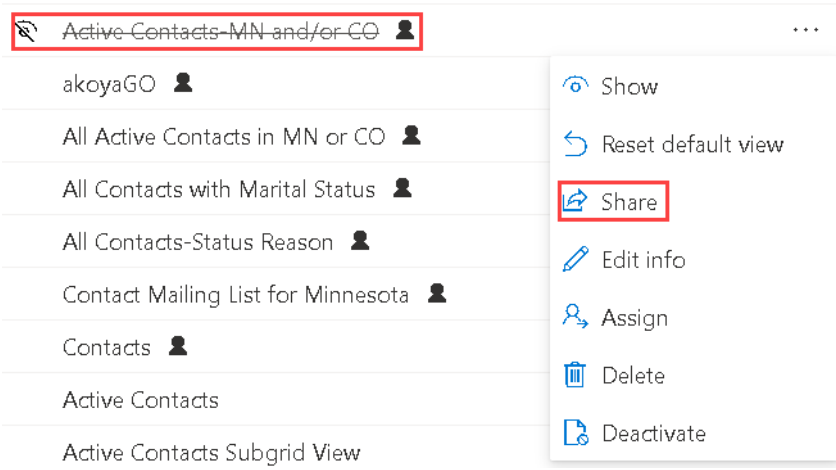

Select View commands (…) and then choose your option.



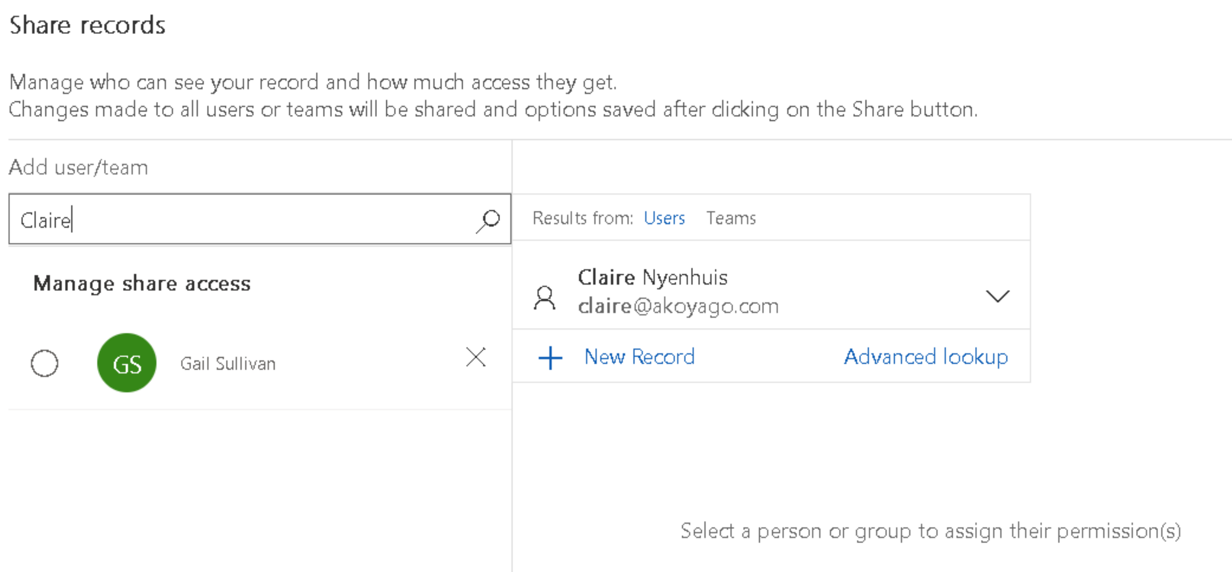
## SHARING A VIEW

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**.

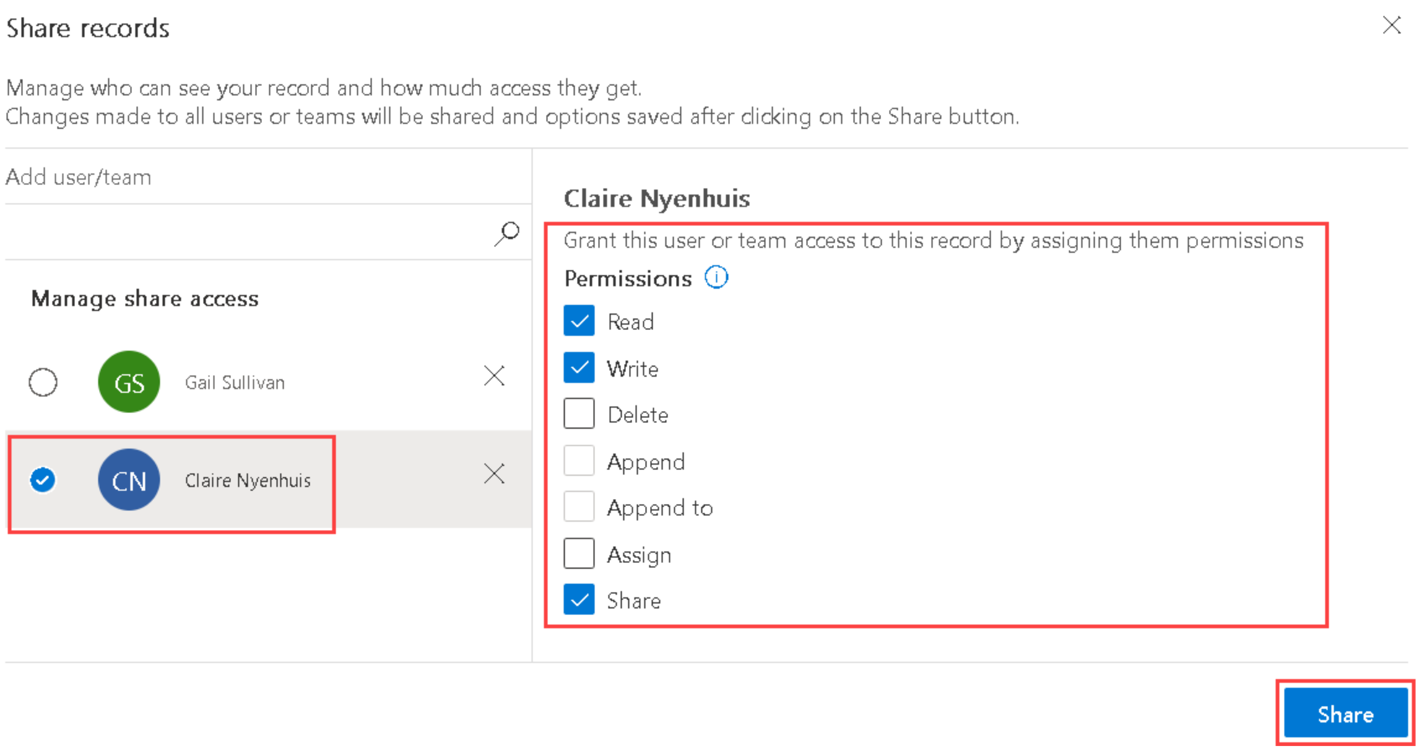
- In the view selector, select **Manage and Share Views**.
- Click on **Share**.




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

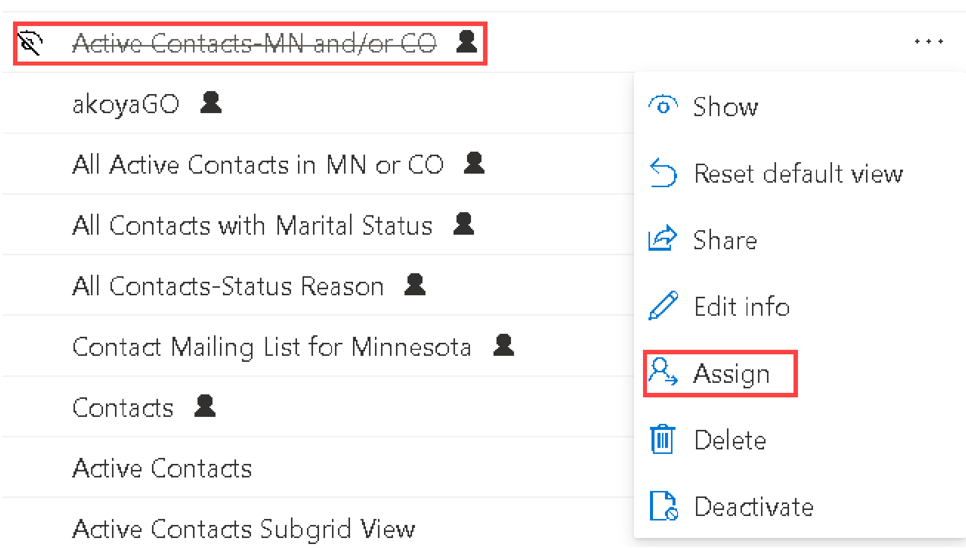



- Select the User and then grant individual permissions: Read, Write, Delete, Assign, and/or Share. You can select one or more permissions per User.

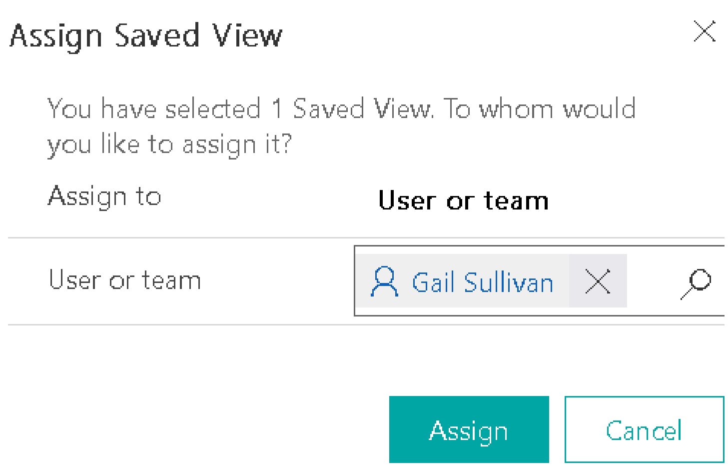



## ASSIGNING A VIEW

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**.




- 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**.




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.

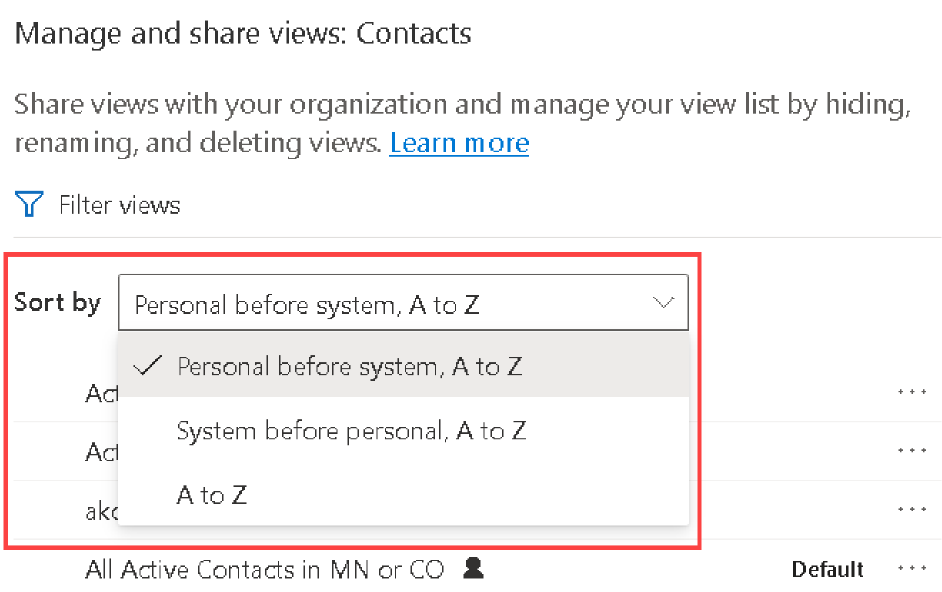
## CHANGE THE ORDER OF VIEWS IN THE VIEW SELECTOR

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.



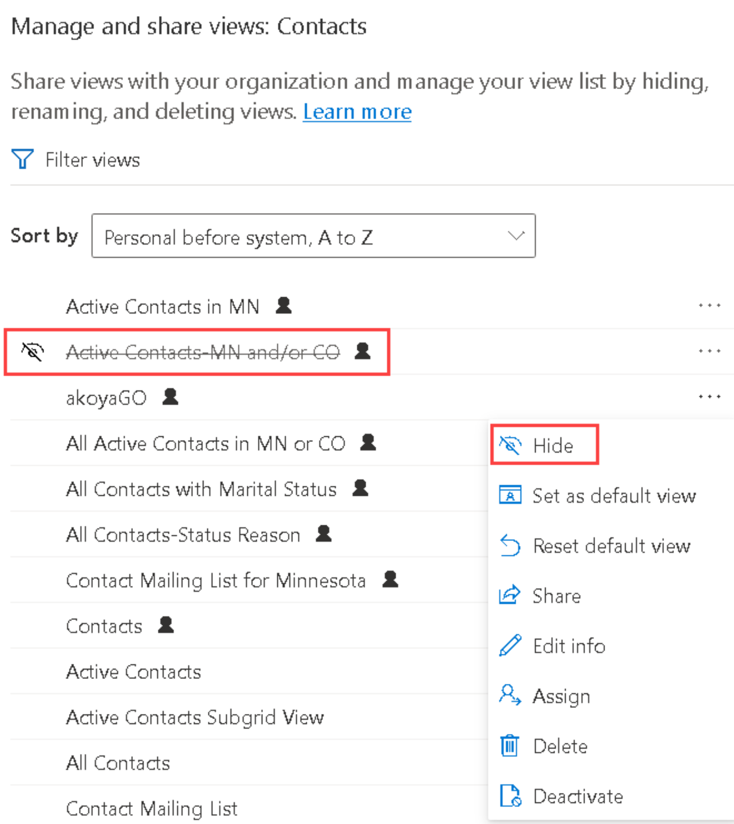
## HIDING VIEWS

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:

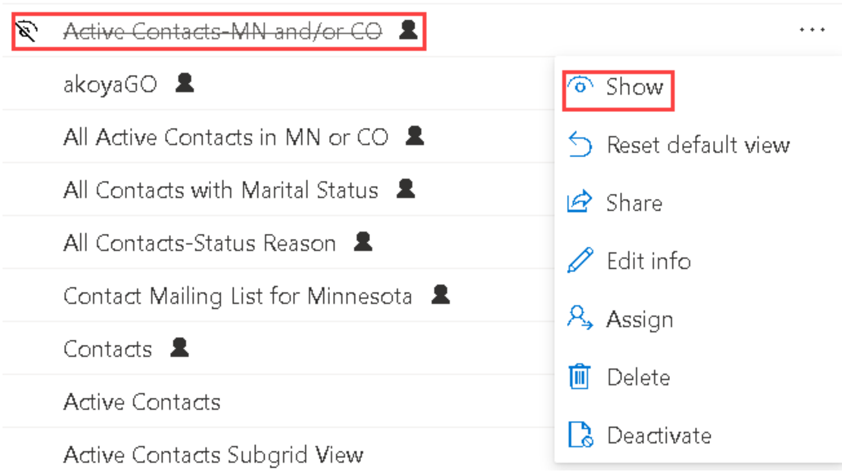
- In the View selector, select **Manage and Share Views**.
- Hover over the View and select **Hide**. Or you can select View commands (**…**) to the right of the View, and then select **Hide**.
- Select **Apply**.




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**.