VIEWS

Types of Views

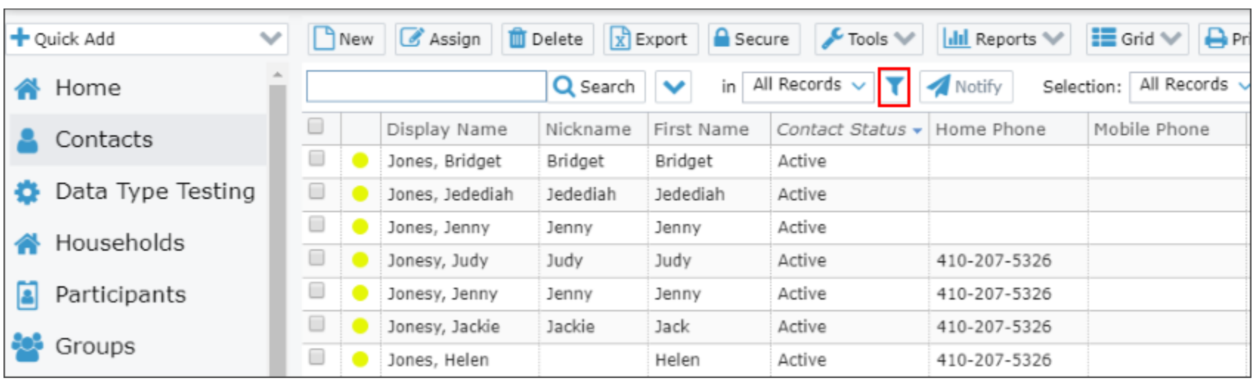
While all Page Views appear in the drop-down list next to the Search button, there are 3 basic types of page views with varying permissions:

- **Personal Views** (User Views) — visible only to their creator who used the Advanced Search tool to create them. Can be on Pages or Sub-Pages.
- **Shared Views** (User Group Views) — visible to all users in a specific User Group because the user that created the view with the Advanced Search tool opted to share the view. Can be on Pages.
- **System Views** — visible to all users unless restricted by a specific security role. Can be on Pages or Sub-Pages

BUILDING A VIEW

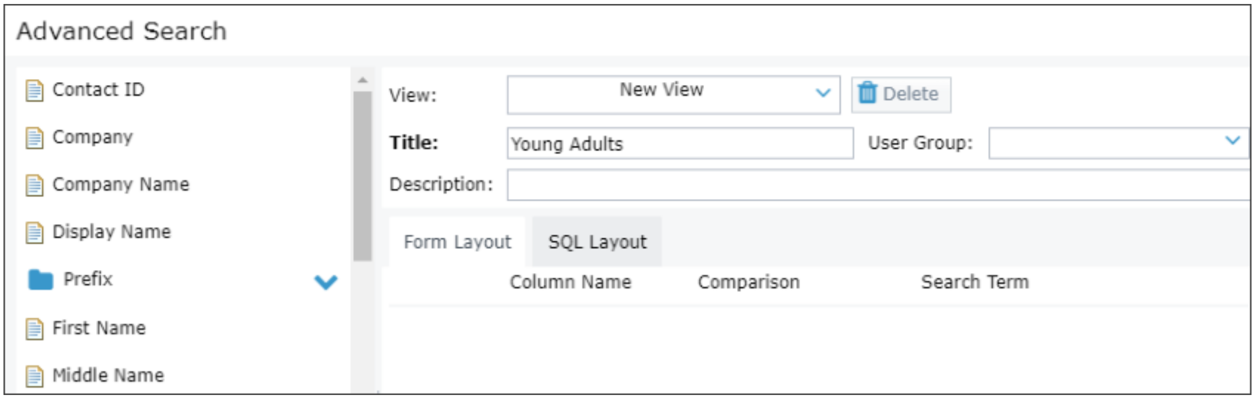
1. Open Advanced Search

Determine the page you want your View to be on and click the funnel button next to the views drop down list.



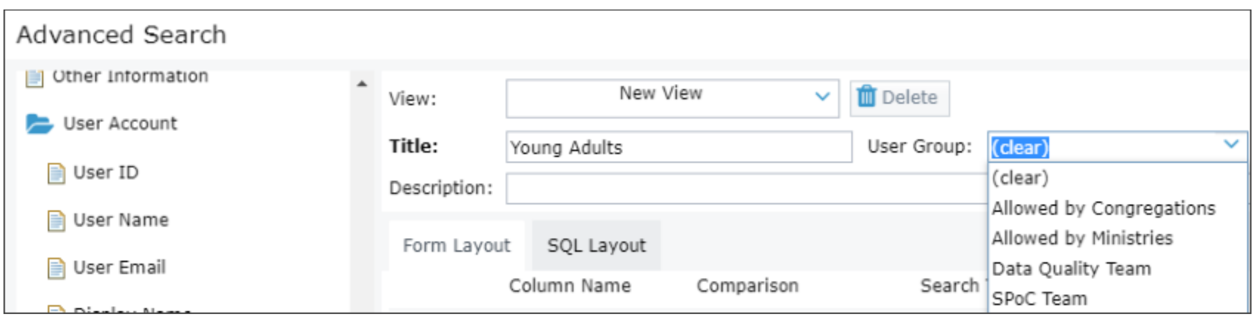
2. Enter a Title & Description

Enter a Title for your View. This is the name that appears in the View drop-down, and should reflect the content your view will show. Enter a description for your view.



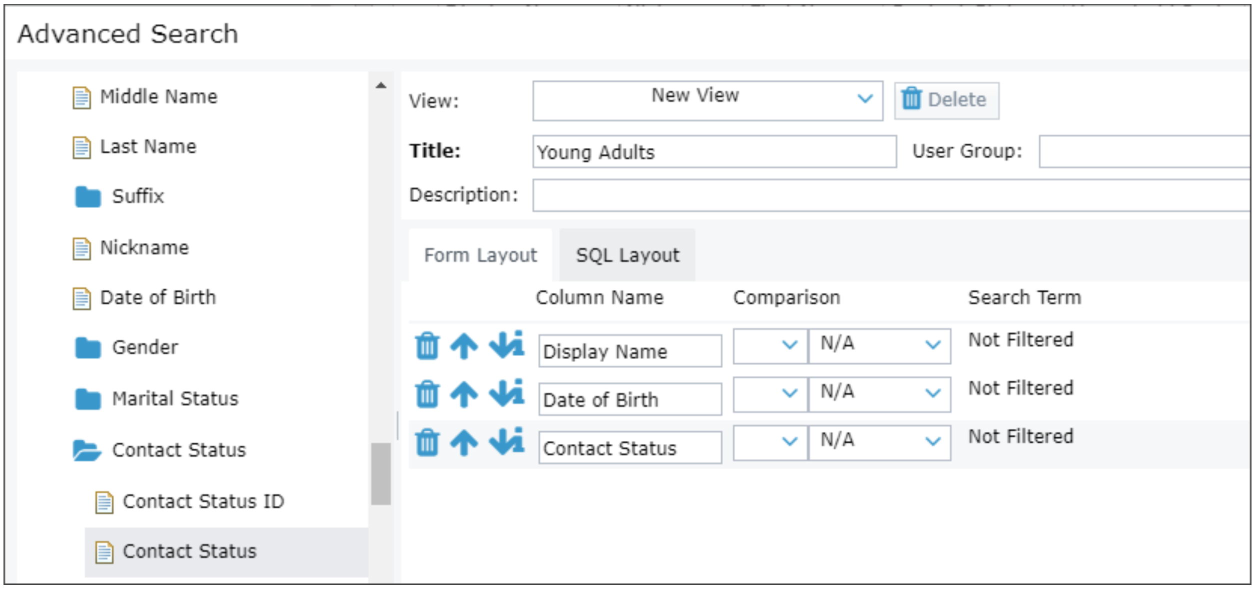
Shared Views

To share a View with others, you can assign it to a User Group using the Advanced Search tool. You are still the author of the View, but now others in the User Group may run it as well. If you would like to share your view with a User Group, select the group from the list.



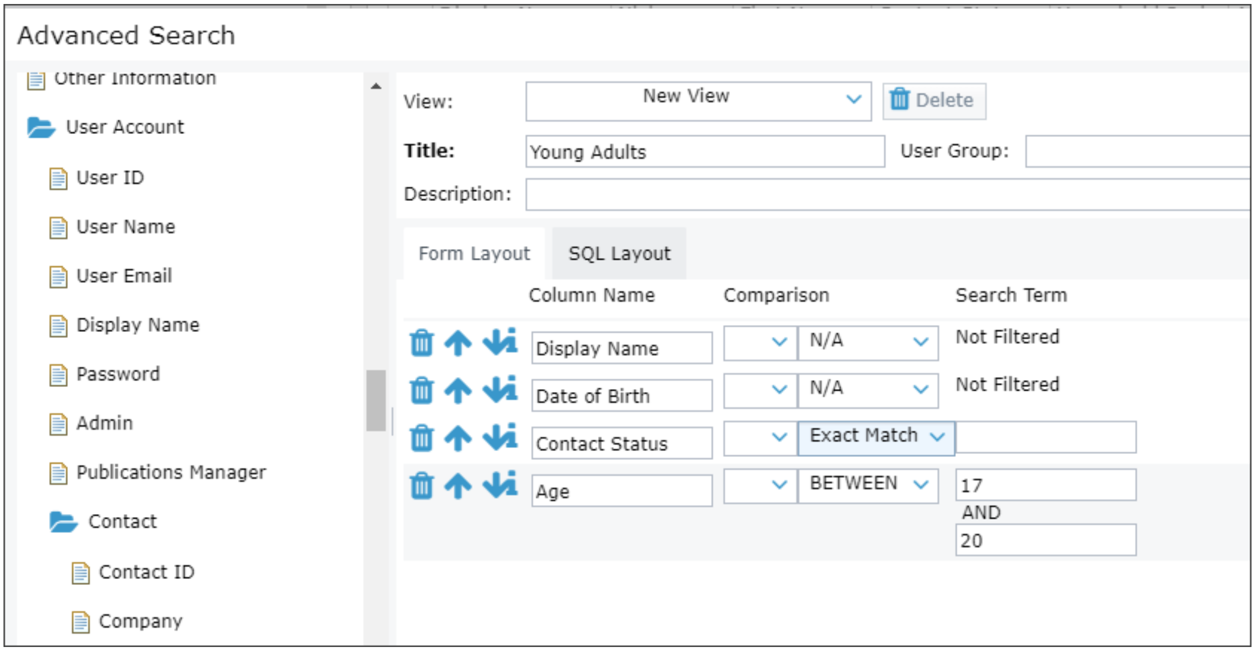
3. Select Fields

Add the fields you want in your View by double-clicking them on the left side of the Advanced Search window. Fields with the document icon are in the table associated with your Page. The folder icons represent relationships to other tables (pages). Expanding these allows you to add fields from other tables. Columns of your View will appear in the order in which they descend in the Advanced Search window. To reorder columns simply drag and drop into the desired location.



4. Add Filters

Views are required to have a filter, which means: criteria that limits the resulting list. To create filters, set comparisons and Search values on the fields you have selected.



A view provides options for creating many types of filters. Each filter is a Comparison which further limits the number of resulting records.

Text Comparisons

Comparison	Description	Example Term	Example Result
Exact Match	Returns only the exact search term	John	John (but not Johnny or Jonathan)
Begins With	Looks at the beginning of the text field	Jo	John, Johnny, Jonathan, Joanna
Ends With	Looks at the end of the text field	com	.com email addresses but not comcast@sbcglobal.net
Contains	Looks anywhere in the field to find a match	Group	Small Group, Group Life, Red Group, Group

Comparison	Description	Example Term	Example Result
IN	Looks in a supplied list for exact matches	Member, Attendee	Member, Attendee
BETWEEN	Looks in a range between two values (inclusive)	J to K	Jansen, Johnson, Jylon (but not Kane, because it's after K alphabetically)
NULL	Looks for empty fields		Will return records where the field is empty
NOT NULL	Looks for fields with values		
Not Equal	Looks for anything but exact match	John	Jonnny, Jonathan, Jerry

Number Comparisons

Comparison	Description	Example Term	Example Result
=	Equals	4	4
>	Greater Than	4	5, 6, 7, (and up)
<	Less Than	4	0, 1, 2, 3 (and negative values if the field supports them)
>=	Great Than or Equal To	4	4, 5, 6, (and up)
<=	Less Than or Equal To	4	0, 1, 2, 3, 4 (and negative values if the field supports them)
<>	Not Equal To	4	0, 1, 2, 3, 5

Comparison	Description	Example Term	Example Result
IN	Looks in a supplied list for exact matches	1, 3, 5	1, 3, 5
BETWEEN	Looks in a range between two values (inclusive)	4 to 6	4, 5, 6
NULL	Looks for empty fields		Will return records where the field is empty
NOT NULL	Looks for fields with values		Will return records where the field is not empty

5. Save your View

Click Save and your View shows up in the view drop-down ONLY on the page on which it is created. You can edit it by clicking the Advanced Search button.

Editing or Deleting a View

To make changes to your View, select it in the list and click the Advanced Search (Funnel) button. You can only edit views that you created.

Deleting a Personal View

You can delete a Personal View using the Advanced Search Tool as long as there are no View Notifications attached. You can attempt to the delete the View and the system will show an error if View Notifications are attached.

To remove View notifications associated with the View, navigate to the "My Notifications" tab, located on the Home page. Select and remove any existing View Notifications for the View.

1. Remove Notifications.
2. Select the View.
3. Launch the tool.
4. Click Delete.

***BONUS: Notifications can be set up to email you the contents of a view as a reminder (lapsing families to contact, or birthdays this month, etc.), or to send an email template to the people in the view. For example: you could run a view of "new members" and have an email template go out once a month to anyone who is listed in that view. If you are interested in setting up some view notifications, let Tori know!**

Complex Comparisons

To attain the same functionality as an "OR" statement, use the "IN" option. First, look up the record IDs for the criteria that is appropriate. Then use the "IN" filter to add the appropriate record ID's to the field in the advanced view. For example, if you want to include two different Group Roles in your view, find the record IDs of the Group Roles you want to view by going to the Group Roles page and opening the record. Then go back to the page your view is on. Add the "Group Role ID" field and filter it using the "IN" option and include the two numbers separated by commas. This is how we have it pull participants from a list of groups. (All students in SS, etc.)