

## Creating and Modifying Custom Views

Within Mtivity you have sections that have built in **Custom Views**. In these sections, you are able to **create your own custom views**.

To access Custom Views, select Dashboard from your Home Page and then the Tab from the navigation bar for the section you wish to either create your new custom view for or modify an existing one.

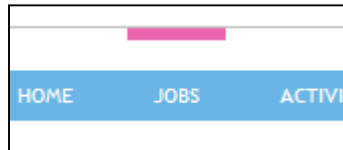


The Tabs that you can create or modify custom views for are:

**Jobs, Activities, Files, RFQs & Quotes, Estimates and Purchase Orders.**

Custom Views are **tab sensitive**, meaning that you can create different views for different sections and that each view only appears in that section you created it for.

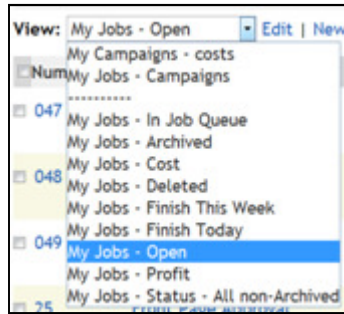
To create or modify a custom view, chose the tab under which you wish to create your new view. For this example, we will choose Jobs.



From here, you will see you have a **View** option above the displayed list of Jobs.



By selecting the drop down menu for View, you will see the current views that either you have created or are system views.



All the views that appear below the dotted line are **system views**. Views that appear above the dotted line are your custom views if you have any entered already.

## *Modifying a System View*

For this example of how to **Modify a Custom View**, we will choose 'My Jobs – Open'.

**Note:** If you are modifying a System View you cannot overwrite / replace the System view, but you can use it as a template to create your new view. If you are modifying a view you created you can overwrite and replace the view.

Select the view you wish to **Modify**.



Then, select **Edit**.



From here you now have **3 steps** to modify your 'My Jobs – Open' view.

**Note:** Within each step there are guidelines, please ensure you read these in addition to this guide to assist your set-up.

## Step 1 - Details.

Step 1 - Enter View Details			
The name given to this Custom View will appear in the Views list for the selected Tab. You may choose to share this view with your colleagues.			
* Name	<input type="text" value="My Jobs - Open"/>	Share	<input checked="" type="checkbox"/> With Colleagues
* Tab	<input type="text" value="Jobs"/>		
Created On	15 Apr 2005 12:46	Created By	System

As this is a system view, we cannot modify it without **changing the name**. Enter the name you wish to give your custom view, for this example we are going to create a custom view to look at open brochure jobs and add 'Brochure' to the custom view title.

* Name	<input type="text" value="My Jobs - Open Brochures"/>
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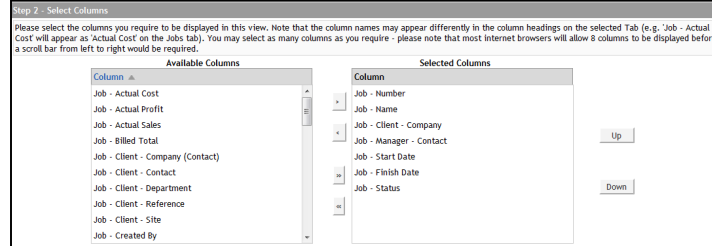
You have the option in step 1 to **share this view** with your colleagues, or keep it just visible in your user account.

Share	<input checked="" type="checkbox"/> With Colleagues
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Check or uncheck the **With Colleagues** box to have this custom view shared or not.

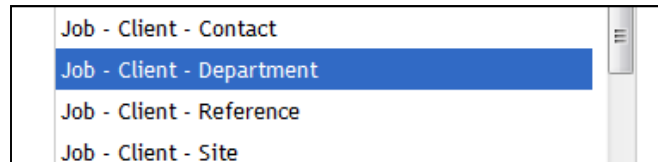
## Step 2 – Columns

You can select or deselect the **columns** you wish to see within your custom view.



Columns that are **available to add** to your view, but that are not currently in your view appear in the left box. The columns in the right box are those **already assigned** to the view.

For this example, we will add another column header to the current list.



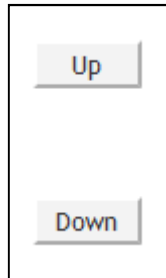
Select to **highlight** the column header you wish to add.

Then using the **right facing arrow**, in between the two boxes move it to the right box.



If you wish to **remove a column** from your view, select the column header in the right box and use the left facing arrow.

You can also control the **display order** in which these columns are displayed in your view, using the Up and Down buttons.



Select the column header you wish to move and then use these buttons to move that column either up or down one place. Click multiple times to move the column more than one place.

When you have all the columns you wish to appear in your view, and in the correct order, you can move to Step 3.

**Note:** 8 is a preferred maximum number of columns header to use without having to scroll side to side.

### Step 3 – Filter Criteria

To further enhance your custom view, you can use **filters** so that your view is specific to your needs.

Step 3 - Define Filter Criteria

Please select any filters you would like to apply to this View. Results may be filtered by any field that appears in a record on the tab selected in step 1 (e.g. if 'Jobs' has been selected, you may filter by any field in a Job Summary page), though some of the columns available in Step 2 may not be available for filtering.

Show records where

	Job - In Team	Is Equal To	Yes
And	Job - Is In Job Queue	Is Equal To	No
And	Job - Has Been Deleted	Is Equal To	No
And	Job - System Status	Is Equal To	New; In Progress
And	-- Choose One --	-- Choose One --	-- Choose One --
And	-- Choose One --	-- Choose One --	-- Choose One --
And	-- Choose One --	-- Choose One --	-- Choose One --
And	-- Choose One --	-- Choose One --	-- Choose One --
And	-- Choose One --	-- Choose One --	-- Choose One --
And	-- Choose One --	-- Choose One --	-- Choose One --

As we are modifying a current view, there are already filters in place. For this example, we wanted to create a custom view that shows us only open jobs that are brochures.

To do this, we would select the **next filter line available**.

And Job - System Status Is Equal To New; In Progress

And -- Choose One -- -- Choose One --

Using the Drop Down Menu, we select 'Job – Type'

And Job - Type -- Choose One --

And as we only want to see 'Brochure' open Jobs, we select 'Is Equal To'.

Is Equal To

Then in the available field, enter 'Brochure'.

And Job - Type [v] Is Equal To [v] Brochure [ ]

Your new field is then entered into this custom view.

When you have completed all 3 steps, select **Save As New**.

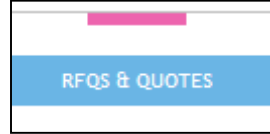
This will then save your custom view to be used within your Jobs tab.

You will automatically be taken to your new custom view after saving.



## Modifying a Custom View – Example 2, RFQs & Quotes.

For a **second example** of how you can use Custom Views, we will enter the **RFQs & Quotes** tab from the dashboard.



You will see then the drop down menu with View options specific to RFQs & Quotes.

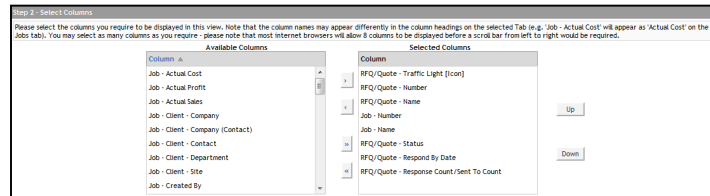


As an example, you may wish to create a view where you can only see the RFQs & Quotes sent to a specific company.

To do this, select **Edit** when in the view 'My RFQs – Sent'.

You will then see the **same 3 steps** as in our example with Jobs, but with information relating to this RFQ & Quote view.

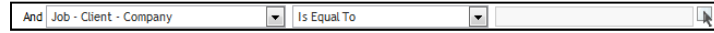
Update the name of your Custom View in **Step 1**, and then move to **Step 2**.



From here, for example, you can add a column to show the client company on your View of sent RFQs & Quotes.

Or, if you wish to view only one specific client company then use **Step 3, Filters**.

Select the **next available filter**, and choose 'Job – Client – Company' and 'Is Equal To'.



You will then be able to choose the client company specific to this view with the **selector tool**.

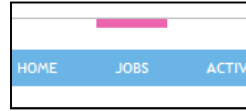


This will generate a pop out window from where you can **select the client company** for this view.

When you have all your details, columns and filters chosen, select **Save As New** to save your view Custom View.

## Creating a New Custom View

To **Create a New Custom View** (from scratch), use the tabs on your dashboard to select the section you wish to add the new view to.



Next to the View drop down menu, you will see options for managing custom views in this tab; Edit, new, Print and Export to CSV.



Select **New**. As we are creating a New view, the current view shown has no relevance.



You will then be presented with a **blank custom view form**, from where you can enter the information you need for your new view.

The **3 steps** are the same as if you were modifying an existing view.

When you have entered all the information, select **Save** to add your new custom view to the selected Tab.

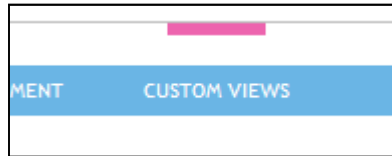
## Managing Custom Views.

If there are **views you no longer use**, you have the option to either Hide or Delete them.

To do this, select **Personal Setup**.

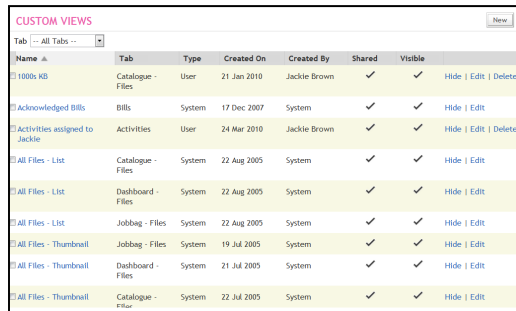


Then **Custom Views** from your navigation bar.



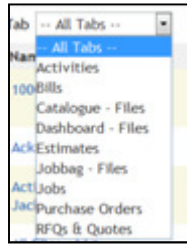
From here you will see a **list of all the custom views** that you have access to.

This includes ones that other members of your organization have entered and selected to share with colleagues, your private views and system views.



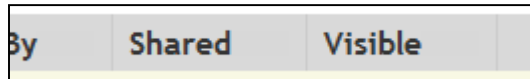
Name	Tab	Type	Created On	Created By	Shared	Visible	
1000s KB	Catalogue - Files	User	21 Jan 2010	Jackie Brown	✓	✓	Hide   Edit   Delete
Acknowledged Bills	Bills	System	17 Dec 2007	System	✓	✓	Hide   Edit
Activities assigned to Jackie	Activities	User	24 Mar 2010	Jackie Brown	✓	✓	Hide   Edit   Delete
All Files - List	Catalogue - Files	System	22 Aug 2005	System	✓	✓	Hide   Edit
All Files - List	Dashboard - Files	System	22 Aug 2005	System	✓	✓	Hide   Edit
All Files - List	Jobbag - Files	System	22 Aug 2005	System	✓	✓	Hide   Edit
All Files - Thumbnail	Jobbag - Files	System	19 Jul 2005	System	✓	✓	Hide   Edit
All Files - Thumbnail	Dashboard - Files	System	21 Jul 2005	System	✓	✓	Hide   Edit
All Files - Thumbnail	Catalogue - Files	System	22 Jul 2005	System	✓	✓	Hide   Edit

The default view will be All Tabs, but using the drop down menu, you can select if you only wish to view custom view information for a specific tab, Jobs for example.



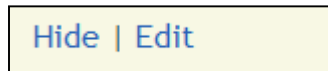
On the All Tabs view, the second column is Tabs, so you will still be able to see which view belongs to which tab.

Whether views are **shared** and/or **visible** will be shown by a check in the appropriate column and line.



**Shared** views are those that have been set up as 'Share with Colleagues'. **Visible** views are those that are active and have not been hidden. Tabs that cannot be deleted can be hidden from your view drop down menu options.

You will see that different views have different options for you to manage them – those that are System Views or owned (created) by someone else will not have a delete option. Those that you have created will have a delete option.



Hide | Edit | Delete

**Hide** will allow you to remove that particular view from your drop down menu of views. Use this if there are views you do not use and do not want to appear as a view option.

**Edit** will allow you to Edit that view, the same way clicking Edit in the relevant tab /view would do. If the view is not created by you, you will need to give the view a new name and it will be 'Saved as New' and not a replacement. For example if a colleague has entered a view that you wish to use, but modify, you can use this option.

**Delete** will be available only to those custom views that you have entered. If you 'Shared' your view with colleagues, then selecting Delete will also remove it from their View options.