

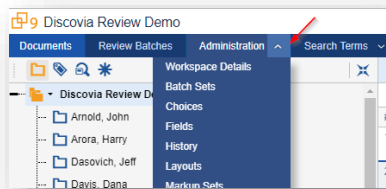
How to Modify and Create Views

Document list views provide selected documents and lists of fields to be displayed in the view. They are created and edited under the **Administrator** tab and **Views**, they can sometimes be edited directly from the main document list view. A Best Practice is to always copy a view that almost meets your requirements instead of creating a new view. This makes it very easy to create a new view from the existing view. In most cases, you will not make your own view however for this document we will cover some of the basics that should be addressed when creating, coping and editing an existing view.

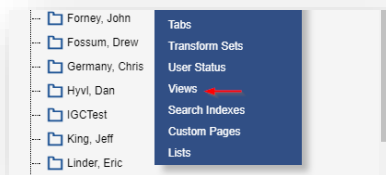
NOTE: Remember if you change an existing view, it changes that view for all users on the case.

In this example, we will show how to copy and existing view, rename and change the fields that are displayed in the view.

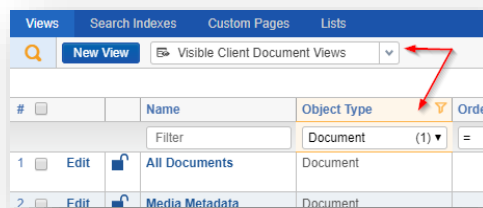
1. Find the **Administration** tab as shown below.



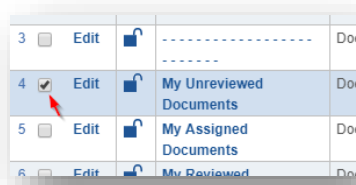
2. Next select **Views** from the list, your list of choices may be shorter then displayed here.



3. From the list of views, you may see a pulldown as shown below. To narrow the list either select **Visible Client Document Views** from the top or use the filter too bar and select **Documents** in this example we selected both options.



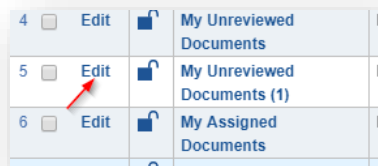
- Find the view to make a copy of and select the check box. In this example, we will use the view **My Unreviewed Documents**.



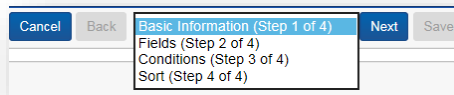
- Navigate to the bottom of the screen and using the Mass Action options select **Copy**. A confirmation window will option select **Ok** to continue (not shown here)



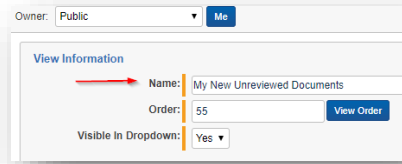
- Once the copy is complete select the copied **My Unreviewed Documents (1)** and click **Edit**



- At the top right corner of the view notice the pull-down menu shown below. There are four basics steps to creating or editing a view, **Name**, **Fields**, set the **Conditions** and set the **Sort Order**

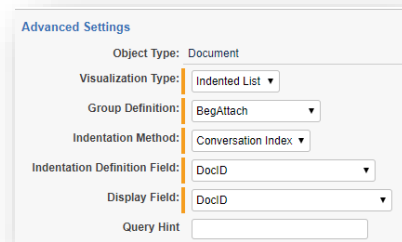


- Under **View Information** change the name of the view. In this example, we have named the view **My New Unreviewed Documents**. We will leave **Order**, where the view falls in the list, and **Visible** in dropdown menu unchanged.



- Advanced Settings controls special displays for the list view. The **Visualization Type** has only two options, Standard or Indented. **Group Definition** can be set to the needed related document field type. For instance, *BegAttach* will group all attachments together, while *EQV_EmailSetIDText* will group threads together. In this example, we will keep the ***BegAttach*** selected.

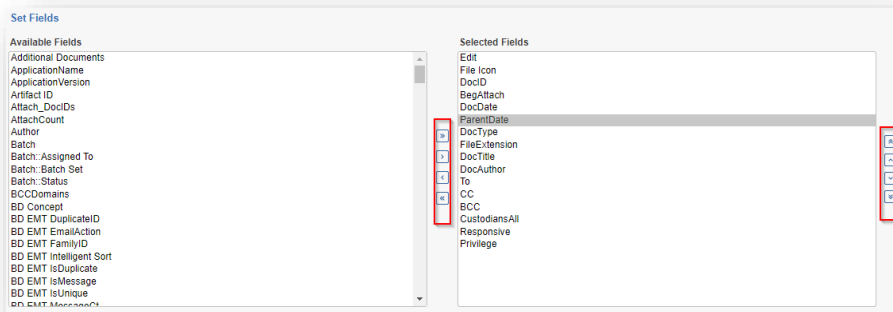
For additional assistance on this topic contact your project manager or team member.



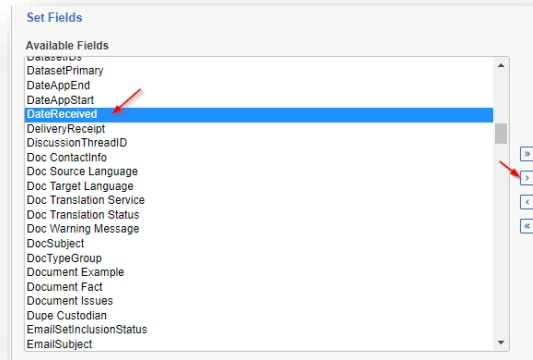
- With the basics defined, click **Next** at the top right of the screen to navigate to the **Fields** step in views. Here select the fields and the order they should be displayed in the view. The list of fields on the left are all available fields, the list on the right are the selected fields.

NOTE: Long Text fields i.e. Extracted Text, Custodians All, and others will expand the row for any document that has a large amount of content. Try different fields and remove those that cause your view to become unusable. Once a field is added the column the field uses can be expanded.

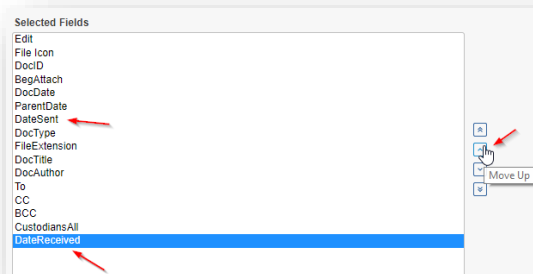
- The arrows in the middle of the screen are used to move the selected field to the right. The top and bottom arrows move all fields and the middle only move the selected fields. The arrows on the far right are used set the order the fields are displayed in the view up and down.



- In this new view, we want to remove the fields used for coding a document, since this view is only showing documents that have not been reviewed. We would also like to add **Date Sent** and **Date Received**. By double clicking on a field from the available list it will automatically add it to the bottom of the selected list. You can also select multiple fields and use the arrow shown below to move them to the selected list.



- To move the fields in the correct order, select a field that needs to be moved and use the arrows on the right to move that field to its new location as shown below we've already moved the field **DateSent** below **ParentDate** now we will move the field **DateReceived** to just below **DateSent**



- Once the fields are in the correct order click **Next** at the top of the screen.
- The Conditions section works the same as an advanced search, defining the criteria documents must meet to be returned in the view. In this view since we copied it from a Batch Review view, it will only display documents that have been **Batched, Assigned to the logged in reviewer** and have not been coded for the field **Responsive**. In this example, we will leave this alone.

View Information

Name: My New Unreviewed Documents

Order: 55 [View Order](#)

Visible In Dropdown: Yes

Set Conditions

[Add Condition](#)

Field	Operator	Value
Batch	these conditions	[Batch: Assigned To] is logged in user AND [Batch: Status] is any of these: In Progress
Responsive	is not set	

AND Clear

Clear

16. The last step defines the sort order for the list we will also leave this alone. Click **Save** to close the view.

Owner: Public [Me](#) [Cancel](#) [Back](#) Sort (Step 4 of 4) [Next](#) [Save](#)

View Information

Name: My New Unreviewed Documents

Order: 55 [View Order](#)

Visible In Dropdown: Yes

Set Sort

BegAttach	Ascending
DocID	Ascending
	Ascending
	Ascending
	Ascending

17. Navigate back to documents to test the new view. Remember you must have a batch of documents checked out or assigned to you to display any documents in this new view. As shown in the example below, the new fields have been added to the new view.

My New Unreviewed Documents + No Related Items [Add Widget](#)

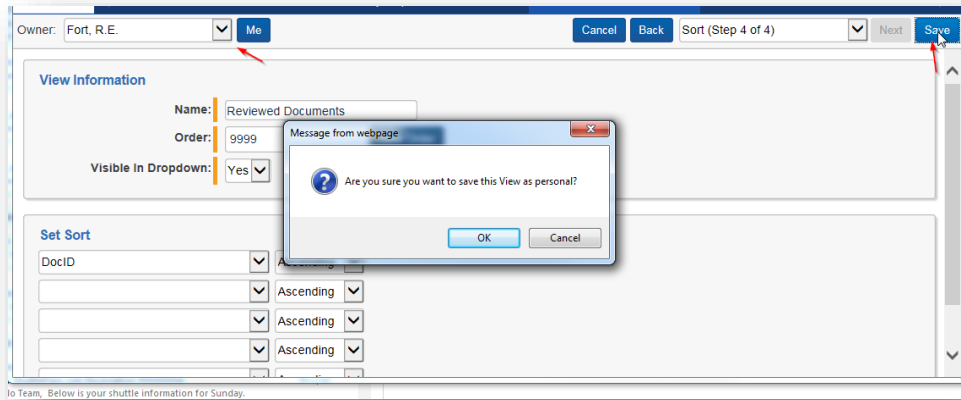
Items 1 - 50 (of 171) in se

#	DocID	BegAttach	DocDate	ParentDate	Date Sent	DateReceived
1	20160310_015-000007081	20160310_015-000007081	01/01/2002	01/01/2002	01/01/2002	01/01/2002
2	20160310_015-000007356	20160310_015-000007356	12/05/2000	12/05/2000	12/05/2000	12/05/2000
3	20160310_015-	20160310_015-	01/22/2001	01/22/2001	01/22/2001	01/22/2001

Private views

As shown in the image below there is an **Owner** option at the top of the View window. This makes a view private and only viewable by the users selected. Private views can be seen and edited by a system administrator. An administrator can create private views for a reviewer and make them the owner of that view.

NOTE: This is not the same as securing a View. For more information on Security, contact your project manager.



For additional assistance contact your Lighthouse team member.