

Appendix A: Creating simple Views

A view is a list of articles in a database. Views let you sort, categorise and select articles. They display information about the articles.

Views can be created by any person with the access to read articles in a database. The person creating a view specifies the view criteria so that only articles fulfilling particular criteria will be listed in that view.

Views are similar to folders, except that views are automatically updated as articles are added to and deleted from your database.

① see [chapter 4: Views](#) for information and instructions about using edDesk's standard views.

OBJECTIVES

By the end of this chapter you should be able to:

- create simple views
- use your views to list articles fitting the view criteria
- go to required views
- edit your views
- rename views
- delete views (that you created) when they are no longer needed.

CREATING A SIMPLE VIEW

The easiest way to create a view is to base it on a view that is already in your database, and then just adjust the conditions and information that you want to display. This gives your view a better chance of working, and can avoid a lot of frustration! When you have more experience, you can create a view “from scratch”.

1. Go to the **Home** tab.
2. Select the **Create** menu.
3. Select *View...*. The **Create View** dialogue box displays.

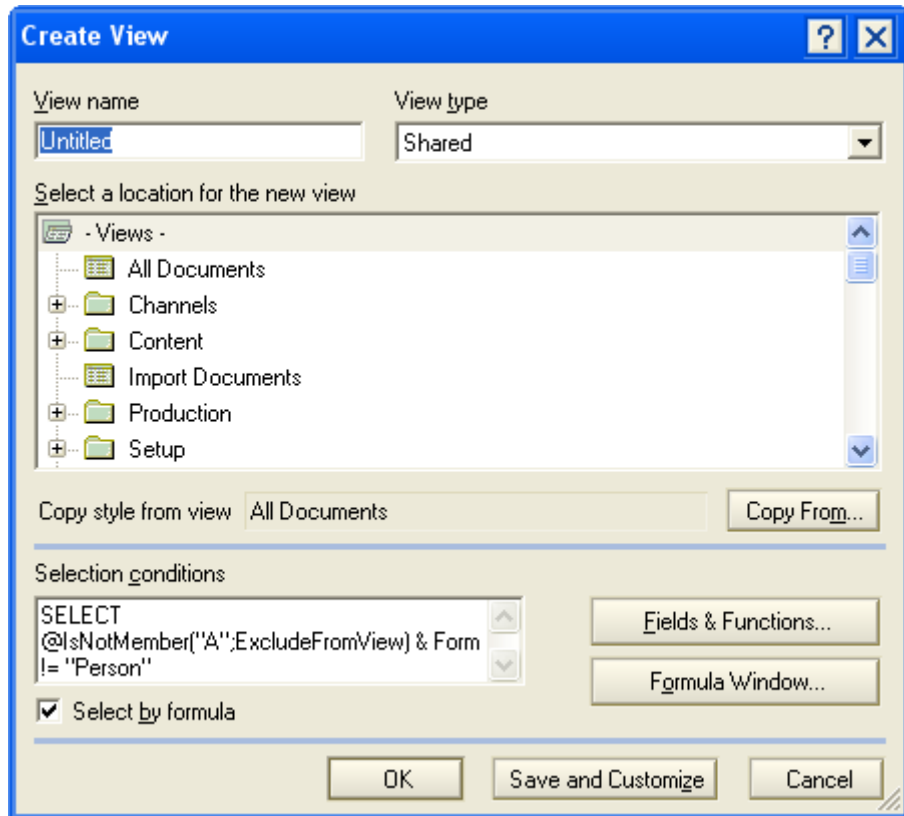


Figure 199: Create view dialogue box with default information displayed

4. View name: enter a name for your view.
5. View type: Your choices are:
 - *Shared* - this is the default. Shared allows anyone with access to the database to use this view.
 - *Shared, contains documents not in any folders* – DON'T WORRY ABOUT THIS ONE
 - *Shared, contains deleted documents* – Lets you see a list of deleted articles. Useful if you have accidentally deleted some articles, because it helps you retrieve them.
 - *Shared, private on first use* – DON'T WORRY ABOUT THIS ONE.
 - *Shared, desktop private on first use* – DON'T WORRY ABOUT THIS ONE.
 - *Private* – can only be used by the person who created it, and the database administrators.
6. Select a location for the view. If your View Type is *Private* you can only put your new view into your list of private views.
7. Copy style from view: The default is *All documents*. This means that your new view will inherit the columns of information that display in the *All documents* view. This is a good thing to do when you are creating your first

view (as the All documents view works properly!) You can add your own criteria for articles to be listed in your view.

① see section for more information on creating views from scratch.

8. **Selection conditions:** If you have left the Copy style from view as *All documents*, this field displays a lot of criteria for articles to be listed in the All documents view. Don't do anything to this field.
9. **Select by formula.** Uncheck this! Then the **Create view** dialogue box changes slightly to let you add conditions for your view.

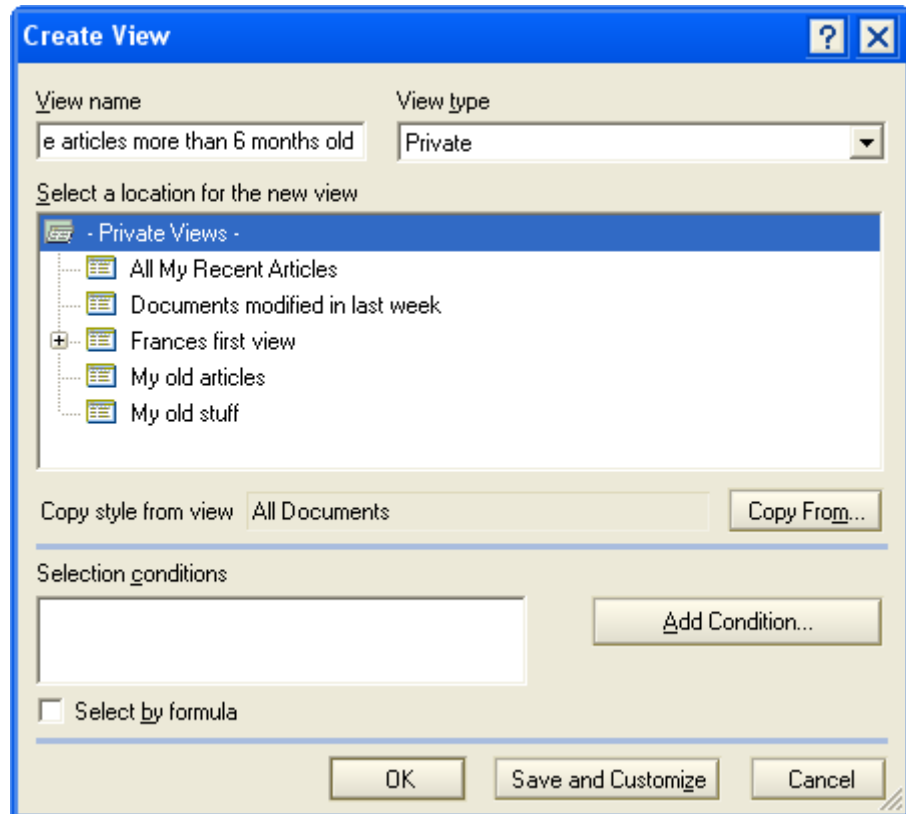


Figure 200: Create View dialogue box with “Select by formula” unchecked. Now you can Add Conditions for your view.

10. Click on <Add Condition...>. The **Add Condition** dialogue box displays. Remember that only articles that match the conditions you enter here will be displayed by your view.

① see [section 5.6i: Conditions](#) for more information on adding conditions.
11. Add the required conditions.
12. Click on <OK>. The view is saved.

GOING TO YOUR VIEW

When you created your view, you selected a location for it. To use your views you must “go to” them. Private views can only be saved in your list of private views.

The easiest way to go to one of your views is to display a standard edDesk view. When you are in a view you can then tell edDesk to go to your view.

1. Display any view (a simple one is **All Issues**, as there will be articles listed).
2. Click once on any article in the view (you don't have to do this if you are using the **All Issues** view).
3. Select the **View** menu.
4. Select *Go To...*
5. The **Go To** dialogue box opens, listing all views.

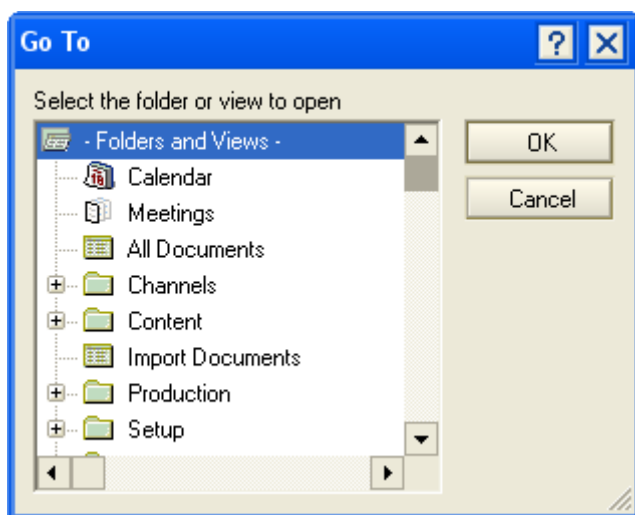


Figure 201: Go To dialogue box. Your private views are at the bottom of this list.

6. Your private views are at the end of the list. Scroll down to the required view.
7. Click on the view you want to go to.
8. Click *<OK>*.
9. Your view is displayed.

CUSTOMISING A VIEW

Customising is a simple way of letting you change which columns display, the order in which columns are displayed and whether they are sorted. Customising does NOT let you edit the view conditions.

1. Go to the view to be customised.
① see [Going to your view](#) for instructions.
2. Select the **View** menu.
3. Select *Customize This View...*. The **Customize View** dialogue box displays.

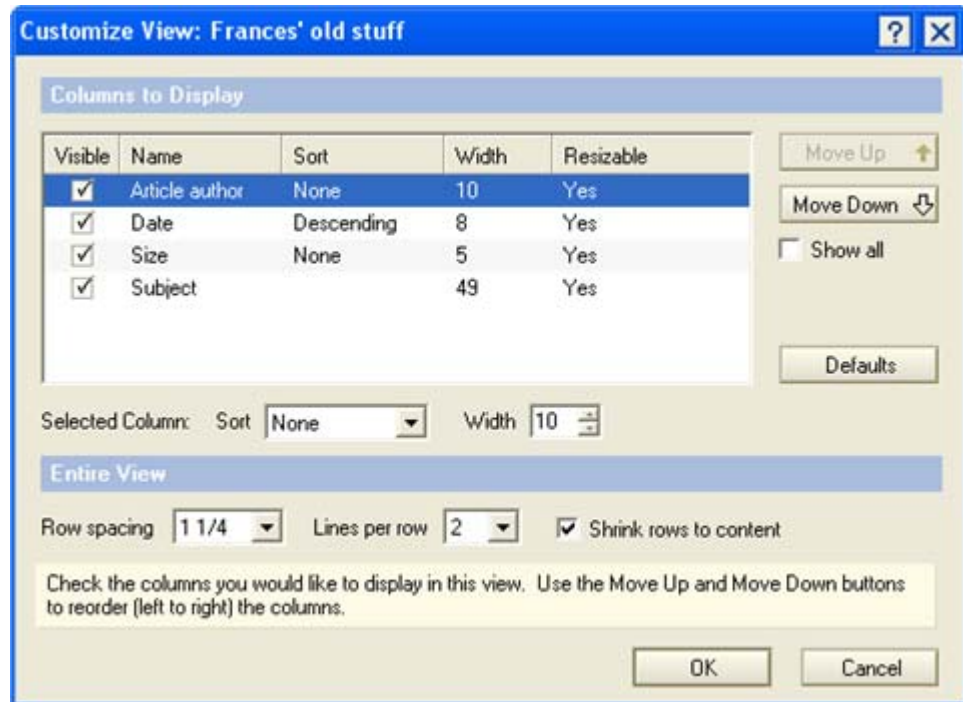


Figure 202: Customize View dialogue box

Columns to Display

Columns are listed with the leftmost column at the top. The first column is selected (highlighted in blue).

Information displayed here is:

- **Visible:** All of your columns are checked by default. If you click on the checkbox (and the tick is removed) your column will not display in the view.
- **Name:** This is the name of the column. This can only be changed in the **Design View** window. ⓘ see [Designing views](#) for more information.
- **Sort:** Indicates whether the column is sorted.
- **Width:** Width of the column as it is displayed.
- **Resizable:** If this is *Yes* you can change the width of the column.
- **Selected Column:** This lets you change the sort method and width of the selected column.
 - **Sort:** Choose from *None*, *Ascending* and *Descending*. *Ascending* will sort in increasing order – the most recent articles are at the bottom of the view. *Descending* will sort in decreasing order – the most recent articles are at the top of the view.
 - **Width:** you can change the width of the selected column, wherever they are shown as *Resizable*.

1. Make sure that any column you want to display has a tick in the **Visible** checkbox.
2. Use the *<Move Down ↓>* and *<Move Up ↑>* buttons to reorder the columns from left to right. *<Move Down ↓>* moves your column to the right, *<Move Up ↑>* moves it to the left.

Entire View

Information you can change here is:

- **Row spacing:** You can set the vertical spacing between each row in the view. The default of 1¼ is usually the easiest to look at without having too much space between rows.
 - **Lines per row.** This is the maximum number of text lines per row in the view. If you have articles with lengthy subjects you may want to increase this so that the subject is not truncated by the view display.
 - **Shrink rows to content:** Tick this to make sure that shorter text lines do not take up the maximum lines per row (and leave too much gap between rows of articles returned by your view).
1. Make the required changes.
 2. Click *<OK>* to save the customised view.
 3. Your view is displayed, showing the customisations you have made.

DESIGNING VIEWS

Creating a simple view covered creating a simple view, based on the **All Documents** view.

This section tells you how to design (and redesign) your view so that you can give your columns a different name, make them appear in a different order and change some other display aspects of your view. Designing allows you to make more changes to your view than Customisation does.

This section does not cover advanced aspects of designing views. Please see the Lotus Help for more information on how to perform more advanced customisations.

Programming not covered

This User Guide does NOT cover programming your view. It does cover editing the conditions you set when creating the view and changing some simple display elements of your view. See your System Administrator if you need a more complex view that involves programming.

1. Go to the view that you want to alter.
 ⓘ see Going to your view for instructions.
2. Select the **Actions** menu.
3. Select *View Options*.
4. Select *Design...*

5. The **Design View** pane opens. This contains some technical information, which you don't need to know about!

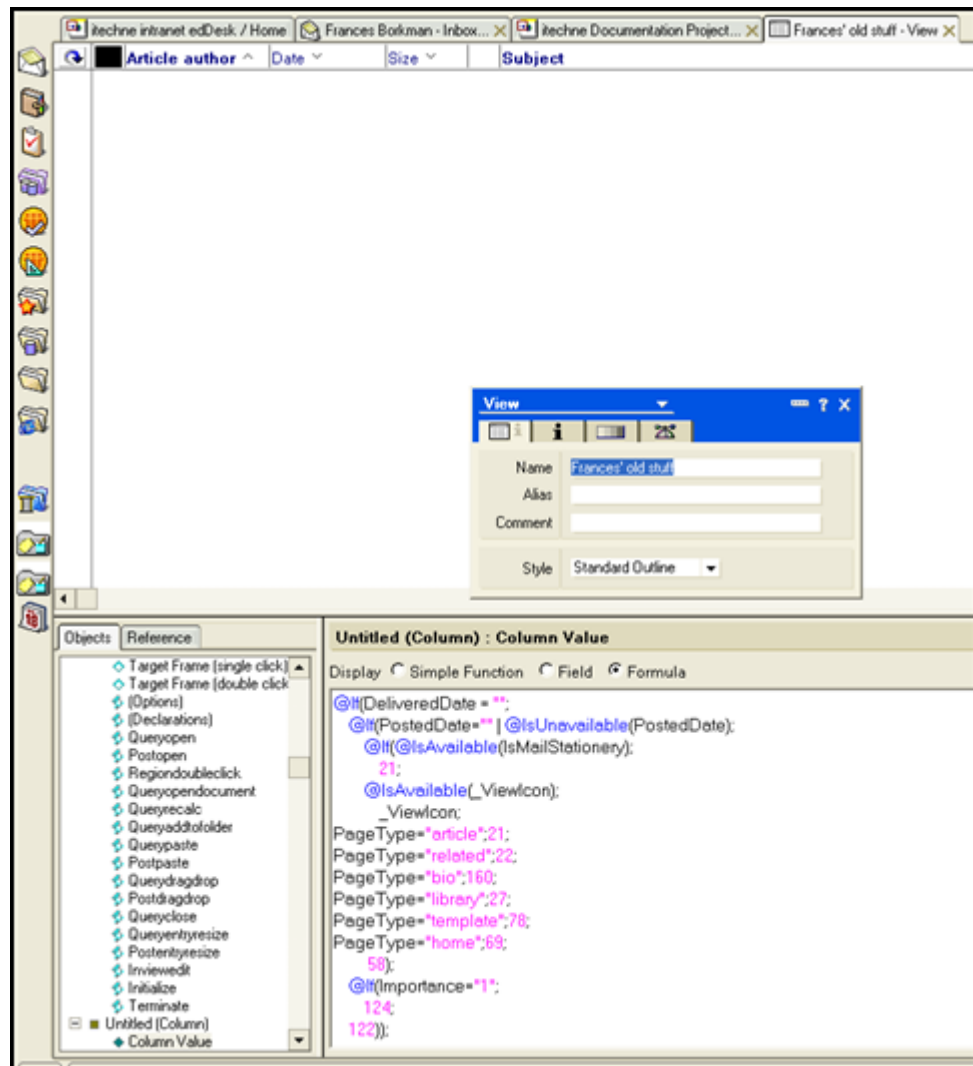



Figure 203: Design view pane, showing the information when your view is based on the "All Documents" view

The top half of the **Design View** pane contains is the **View Preview**. If you want to see a list of the articles returned by your view, click on **<Refresh (F9)>** or the  at the left of the column headings.

The bottom half of the **Design View** pane is where you make your changes to the view. It is split into two parts – the left column contains elements of your view (this is technical and is not covered in this User Guide). The right column contains the programming details which make the elements in the left column work properly (this is also not included in this User Guide).

Instructions for making simple changes to a view are below.

Modifying selection conditions

Selection conditions determine which articles are listed by your view.

1. Click on the **Selection Conditions** icon - .

2. The current selection conditions are displayed in the bottom right pane of the **Design** pane.

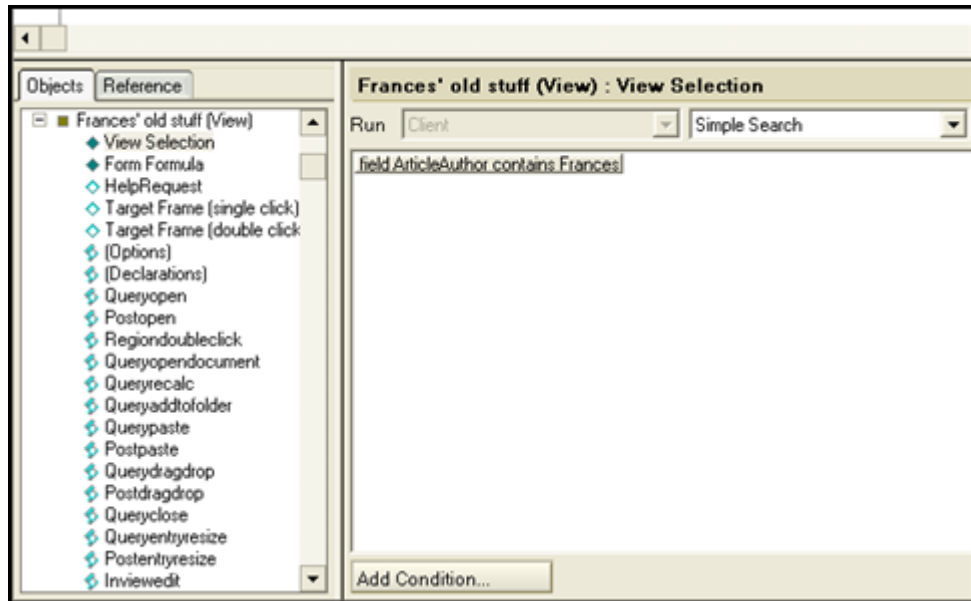


Figure 204: Selection conditions for the view "Frances' old stuff". The only condition is that an article field called ArticleAuthor must contain the name Frances.

3. If you want to add a new condition, click on <Add Condition...>.
 ⓘ see [section 5.6i: Conditions](#) for information on adding conditions.
4. If you want to edit a condition:
- Click on the condition to be edited.
 - Click on <Edit Condition...>. Make the required changes
 - Click <Add>. Your changes are saved.

If you do some non-technical administration as well as create articles...

and you want your view to only list articles where you are an author, not everything that you have created then make sure that your selection condition has the following:

Condition: By field

Field: ArticleAuthor contains

Value: (your name, as it is entered in edDesk)

View properties

View properties control the appearance of the entire view. This includes colours used, text fonts and the view name.

The **View properties** dialogue box must be displayed before you can change view properties.

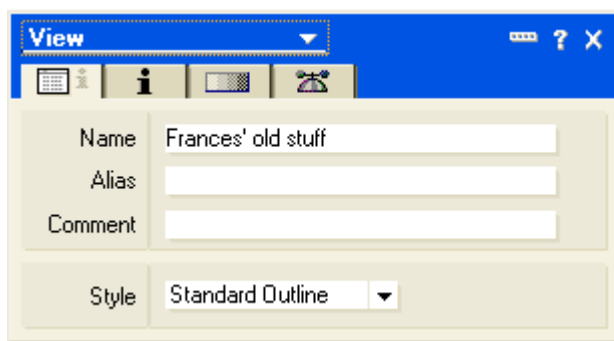



Figure 205: View properties dialogue box

If the **View properties** dialogue box is not displayed click on the **Database properties** icon .

Renaming a view

1. Click on the **view info** tab (the left tab in the View properties dialogue box).
2. Name: enter the new name for the view.

Style attributes

Style can make your view easier to use. Style lets you change the layout of the view. Some of the style options can also be changed in the **Customize View** dialogue box. Changes you make in this tab are shown straight away in the top of the Design View pane.

Note

Not every option is discussed here. You can experiment with the style options and see the results immediately and without affecting which articles are listed.

1. Click on the **style** tab (second from the right in the **View properties** dialogue box). The **style** tab opens.

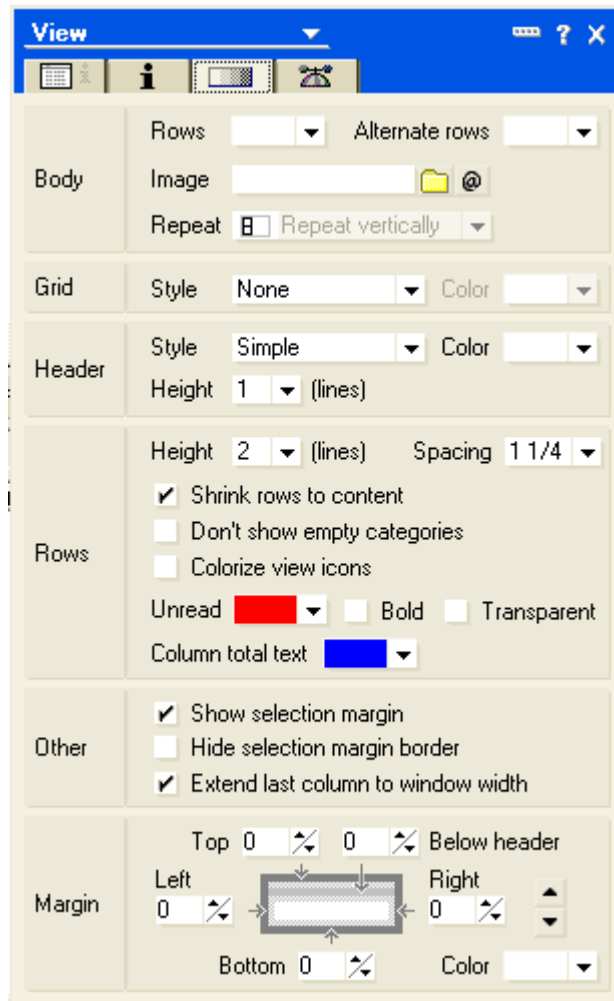
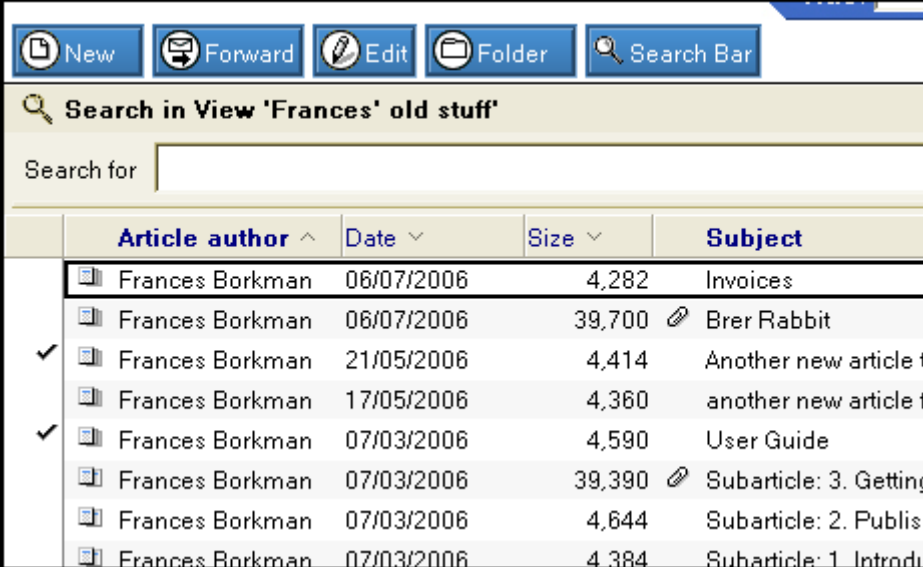


Figure 206: Styles tab

2. **Body:** used to select colours for the view.
 - *Row:* select a colour for the background of the view
 - *Alternate rows:* select a different colour for alternate rows to have a different background colour. This makes your view easier to read.
3. **Grid:** sets a style for gridlines in the view. Grid displays according to the settings in the Header option. Be careful with the Grid option as it can make your view harder to read.
 - *Style:* select a style. The default is none.
4. **Header:** Shows a bar at the top of the view, with column titles in different looks. Your settings here affect how the Grid displays.
 - *Style:* select a style.
 - *Height:* specifies how many lines the header will take up. If you have long column titles you may want more than one line for the header.

5. **Rows:** specifies how many lines a column can contain and the spacing between each row. Articles that use more than this will have information truncated. You can also make these settings in the **Customize View** dialogue box.
6. **Other:**
 - *Show selection margin* – displays a margin to the left of articles in the view. Selected articles are indicated with a tick. This makes it easy see when you are selecting multiple articles.




	Article author ^	Date v	Size v	Subject
	Frances Borkman	06/07/2006	4,282	Invoices
	Frances Borkman	06/07/2006	39,700	Brer Rabbit
✓	Frances Borkman	21/05/2006	4,414	Another new article
	Frances Borkman	17/05/2006	4,360	another new article
✓	Frances Borkman	07/03/2006	4,590	User Guide
	Frances Borkman	07/03/2006	39,390	Subarticle: 3. Getting
	Frances Borkman	07/03/2006	4,644	Subarticle: 2. Publis
	Frances Borkman	07/03/2006	4,384	Subarticle: 1. Introdu

Figure 207: Document selection margin with some selected articles

- *Hide selection margin border* – if the selection margin is visible, this will remove the border between the margin and the article information.
 - *Extend last column to window width* – select this to make your view easier to read.
7. **Margin:** Lets you select the amount of whitespace around the view contents.

Column properties

Columns contain information about each listed article. Column properties let you rename the column, change the display of column headings and contents, and sorting of articles within the column.

Display the **Column properties** dialogue box. If the **Column properties** dialogue box is not displayed click on the *Database properties* icon . If the **View properties** is displayed, click on the dropdown list in the top left of the dialogue box and select *Column*.

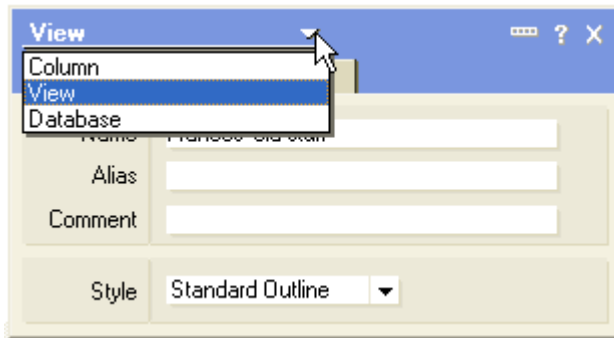


Figure 208: Changing the properties dialogue box from View

Renaming a column


1. Move your mouse to the **View Preview** pane. Click on the column header that you want to rename.

Note


If you click on the column contents the Column properties dialogue box changes to the View properties dialogue box. Click on the column header to redisplay the Column properties.

2. **Title:** enter the new name for the column.

Changing the display of column headings

1. Click on the **Title** tab .
2. Select your title attributes.
3. If you want to have the same title styles for each column click on *<Apply to All>*.

Changing the display of column contents

1. Click on the **Font** tab .
2. Select the font attributes.
3. If you want to have the same style for each column click on *<Apply to All>*.

Sorting column contents

Sorting columns lets you organise the view display so that it is easier read. For example, if you have created a view that lists all of your articles by date, you might want to sort the dates so that the oldest article is at the top or bottom of the view.

1. Click on the **Sort** tab . The **Column Sort** dialogue box displays.

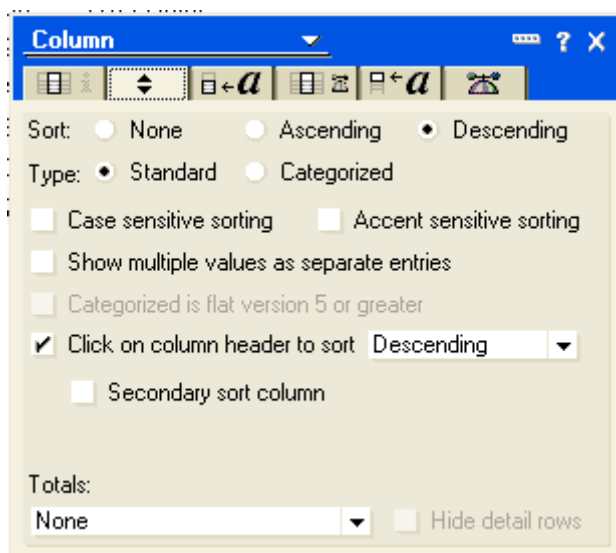


Figure 209: Column Sort dialogue box

2. Change your sort options as required.

- **Sort:**
 - *Ascending* - sorts in increasing order. That is numerical starting at the lowest number, then alphabetical, earlier dates before later dates.
 - *Descending* – sorts in decreasing order. That is, largest number down to smallest number, reverse alphabetical (Z-A), later dates before earlier dates.
- **Type:**
 - *Standard* – Repetitive information in a column is listed separately for each instance of that information. For example, if you are sorting the author column and there are several articles by the same author, the author name is repeated for each of their listed articles.
 - *Categorized* - groups same information in a column together. This is useful to get a list of articles by particular authors so that the author name is not repeated next to each listed article.

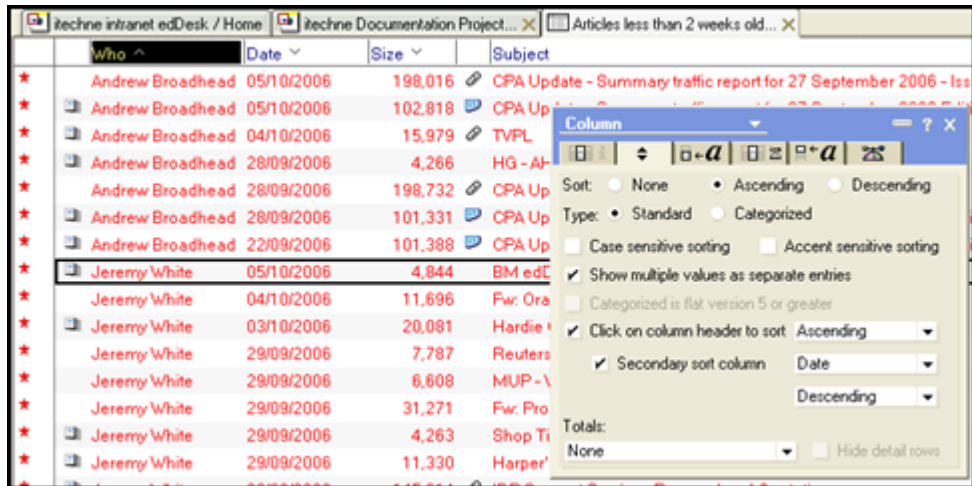


Figure 210: Author column is sorted with Type: Standard. Red colour just means that the article has not been read by the view creator.

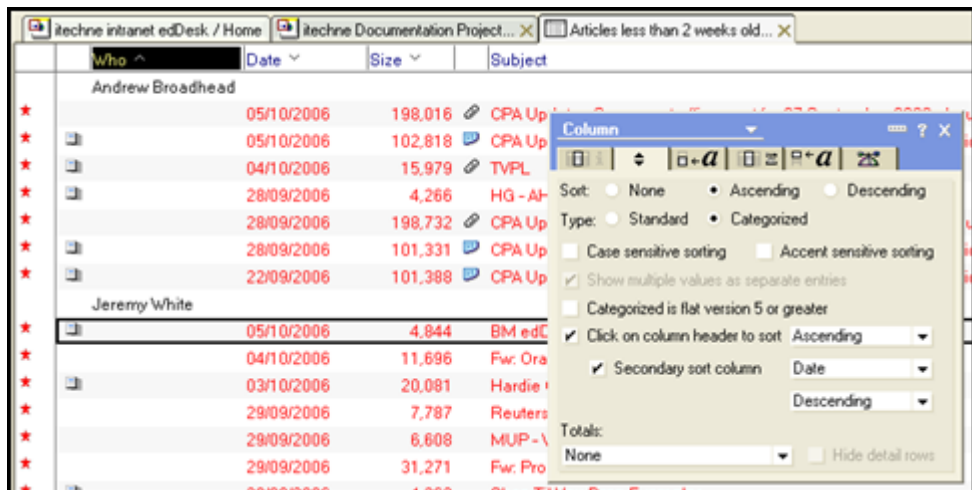


Figure 211: Author column is sorted with Type: Categorized. Red colour just means that the article has not been read by the view creator.

- *Case sensitive sorting* – sorts lowercase before uppercase.
- *Accent sensitive sorting* – sorts accented characters after non-accented characters.
- *Categorized is flat version 5 or greater* – don't worry about this!
- *Click on column header to sort* – Tick this option so that when you are using the view if you click on the column header you will change the sort order. This is useful!
- *Secondary sort column* – Lets you have multiple levels of sorting. For example, if your first column sorts by author, you might like a second column sorting by date, so that all the author's articles are listed in date order.

Saving a view after you have designed it

There are a few ways of saving your view from the Design pane. Do one of the following:

1. Press <Ctrl> + s; OR
2. Select the **File** menu then select *Save*; OR
3. Click on the close icon (the cross at the top right of the View tab name). You are prompted “Do you want to save your changes?” Click on <Yes>.

RENAMING A VIEW

Make sure your view names indicate the type of information displayed by that view. If you have modified your view since creating it, you may need to change its name.

1. Go to the view to be renamed.
 ⓘ see [Going to your view](#) for instructions.
2. Select the **Actions** menu.
3. Select *View Options*.
4. Select *Rename...*
5. The **Rename** dialogue box displays.

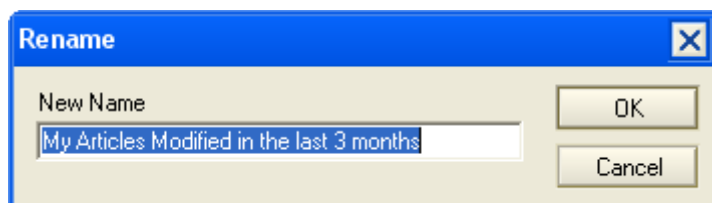


Figure 212: Rename dialogue box with old name highlighted

6. Type the new name for your view.
7. Click <OK>. Your view is renamed.

DELETING A VIEW

1. Go to the view to be deleted.
 ⓘ see [Going to your view](#) for instructions.
2. Select the **Actions** menu.
3. Select *View Options*.
4. Select *Remove View*.
5. You are prompted This action may not be undone. Are you sure you want to delete the view (your view name) from this database?
6. If you really want to delete the view click <OK>.