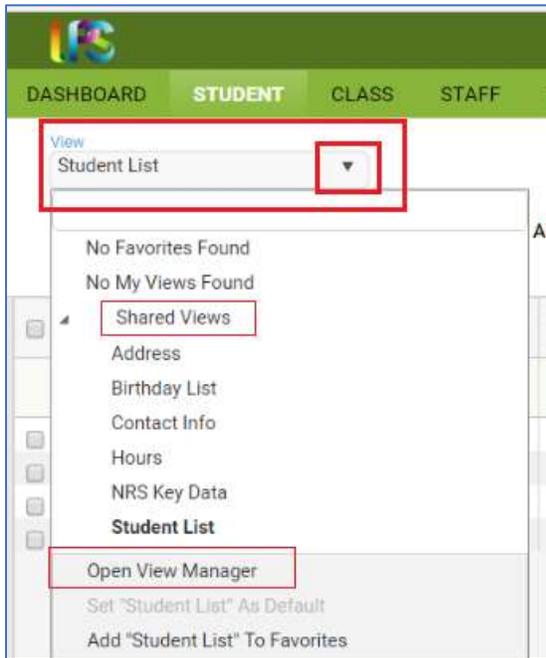


Views are defined as the columns displayed for the population grid. Shared views are predefined and are available on a dropdown list that displays at the top left of the student grid. Custom views can be created to add, remove, or re-order columns as needed.

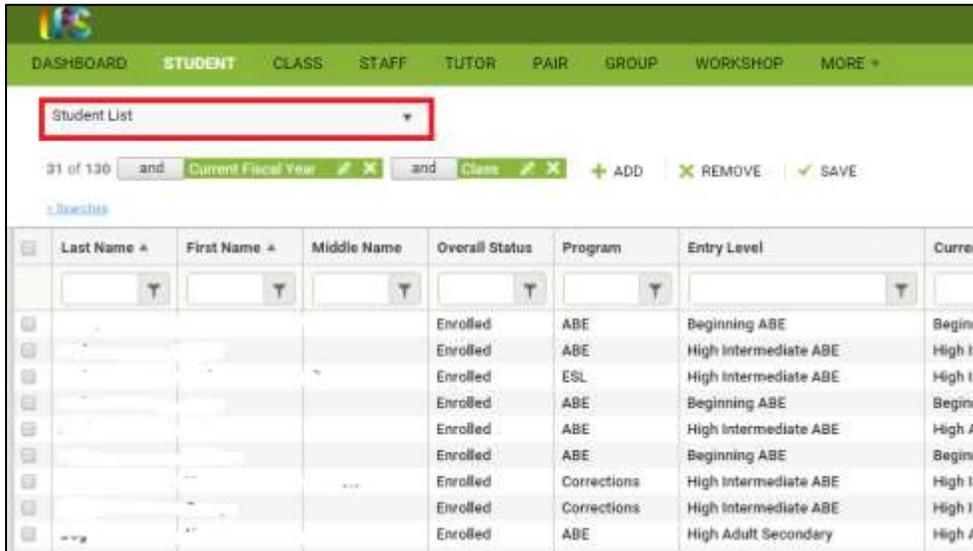


There are currently six shared views. (We plan to add at least one additional view, called Employment Barriers, in late 2016 or early 2017). The default view is **Student List**, which displays columns on the grid that provide at-a-glance information about overall status and assessments. The view may be changed by selecting a different view from the list. This view will be in effect until you change it, even if you leave the student grid temporarily by clicking on a different tab, and then return to the student grid.

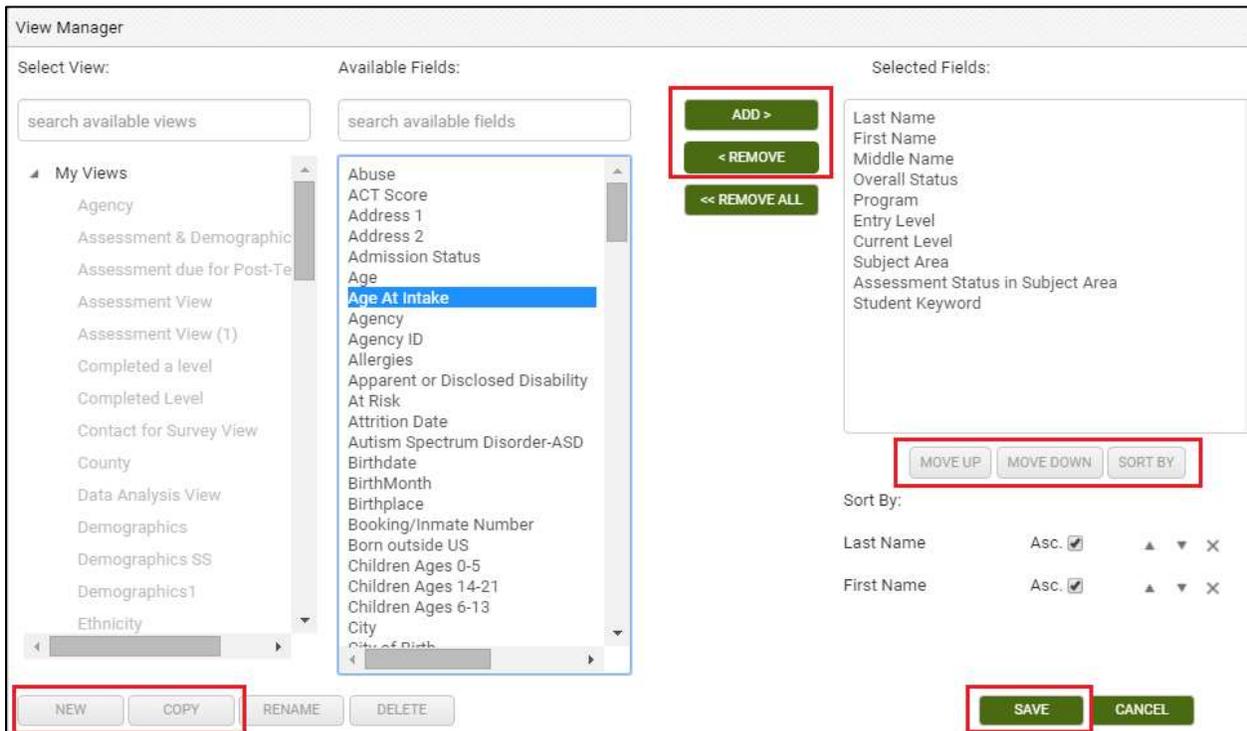
To change the view, click the arrow on the drop down list. The first item is Favorites. A **favorite view** is a view that you use often, whether it is a shared system view, or a view that you created. Views that have been added to Favorites will display at the top of the list. 'No Favorites Found' will display if no views have been added to Favorites. Views that you create and save will display under 'My Views.' 'No My Views Found' will display if you have not created any views. The third item on the list is 'Shared Views' with an arrow in front that allows you to expand or collapse the Shared Views list. Shared views are standard system views that are available in all agencies. A shared view can be applied, set as a favorite, or set as the default. **Shared system views cannot be modified**, but you may copy a shared system view, make modifications to the fields, and then save with a new view name.

A view is not a search. It does not automatically filter any information, although once a view is applied, the in-column filtering can be used to filter based on added columns. The view simply displays the data contained in the added columns, if that field was filled in for the viewed record.

To create a Custom View, go to the View: "Student List" window under the Menu bar in the upper left corner. Creating Custom Views in other populations will follow the same steps, but with different default view names.



Click the drop-down menu icon and Select "Open View Manager." From here, you can create a new view or modify an existing view. "New" (not recommended) will remove all fields and let you start completely from scratch, while "Copy" (recommended) allows you to start with the fields from the copied view and add or delete fields to create a new view but not have to enter in already present fields such as First and Last Name.



The left-hand column will display your views and shared views. The middle column displays all of the available fields that can be added to your view. In the right-hand column are the fields currently being displayed.

You must create a New or Copied view to make modifications; if you try selecting from the Available Fields without clicking New or Copt and saving the View name first, you will not be able to click, as the field names will be inactive (indicated by the grey window). Once you have saved the view name for your New or Copied view, can add fields by clicking once on the field in the middle column to select it, then clicking the "Add" button." If you are adding multiple fields, you can hold down the CTRL button on the keyboard while making your selections to highlight more than one, and then click Add to add all of them at once. You can remove fields by clicking once on the field in the right-hand column and clicking the "Remove" button. You can also hold down the CTRL button to make multiple selections and click Remove to remove multiple fields at once. Clicking Remove All will remove all of the fields, including Last Name and First Name. You can also change the order in which fields display by clicking the "Move Up" and "Move Down" buttons. Click Save once you have added or removed the fields you want.

When creating or modifying a custom view, you can select the "Sort By" button to pre-determine the order in which columns sort. The default order is alphabetically by last name, but using the "Sort" function allows you to pre-order multiple columns at a time based on the criteria you choose. Bear in mind that you can also always sort columns into ascending or descending numeric or alphabetical order by clicking the column heading for ascending order, then clicking once more for descending order.

Sort Fields

Once you have created a view, you may specify how you want the fields to sort. You may also modify the field sort on a view that you created.

- Click the 'Sort Fields' link.
- The window to choose field order will display.
- Click the + at the top to add a new record.
- A row will populate with the first field name from the 'Show these fields in this order' column. To change the field, click on the field name to get a drop down list of the fields in the view.
- Choose order defaults to 'Asc' (ascending) to sort A-Z. To change the order, click on the sort name to get a drop down list, and click Desc (descending) to sort Z-A.
- Click Apply to save the changes, or click Cancel.

Sort records may be deleted by clicking the Delete button.

Custom Views get saved and can then be applied. You can return to the default view by going to the view window again and selecting Student List. A saved view can be re-applied at any time by going to the view window>My Views and locating the view by name. If you export or print data with a Custom View applied, the data in your custom view is what will export. You can make a custom view that you have created into the Default View by clicking in the View manager window and clicking the option at the bottom called Set {created view} as Default.

Data set up as a custom view can be exported by selecting the Export>CSV option in the right-hand menu of the grid in which you are working.