All users can create personal "views" that change the way a tab's information is filtered and displayed.

Understanding "Views"

A "view" is an option in the CCTO Tool that changes the way a tab's information is filtered and displayed. Review the basics below. *You may also refer to slides 8-9 of View and Downloading Training for Administrators for a detailed explanation of this functionality.*

1. Note that the tabs for "Contacts," "Assessments," "Activities," and "Tasks" all display information about different records. **All these tabs support views and may be used as the basis of a new view.** Click into the Contacts Tab.

2. Note that the "Active Contacts" view is displayed. If you click these words, you will see all the other views available to you. **Each view changes the columns of information shown and/or filters the records to show information customized to that view.** For example, we know that "My Active Contacts" filters on records owned by you and shows specific columns of information about these records.

3. "System Views" are automatically available to all users, and "My Views" are personal views created by or shared with you. **Contact your CCTO administrator with any questions or concerns about views available to you.**

① **Contacts Tab**
② **Views dropdown**
③ **Types of Views**
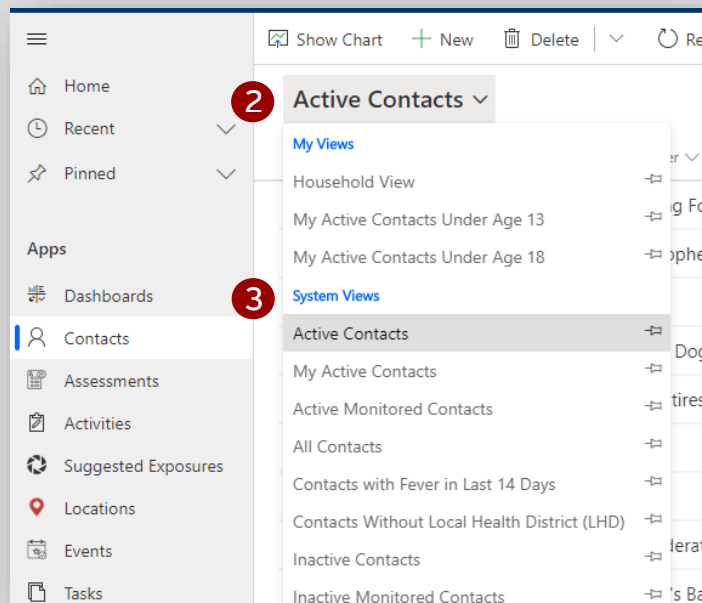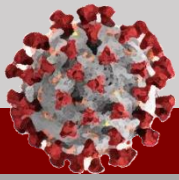
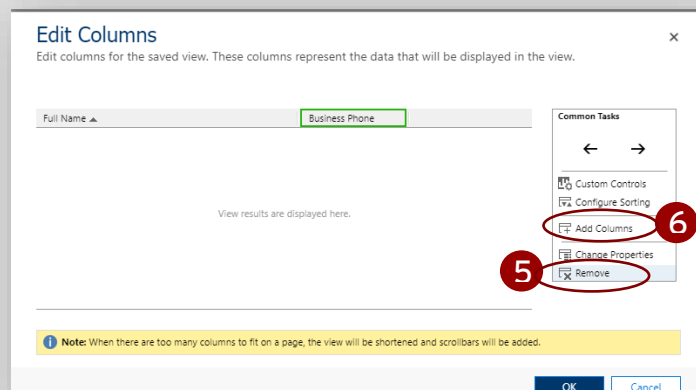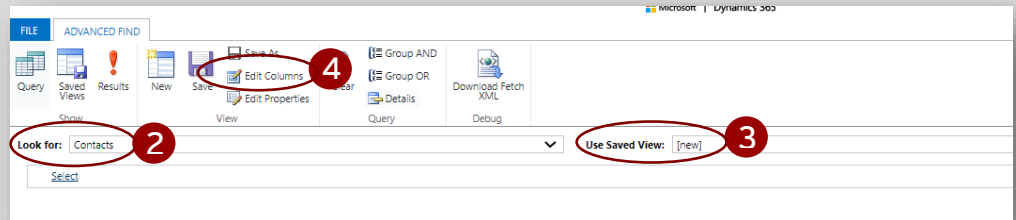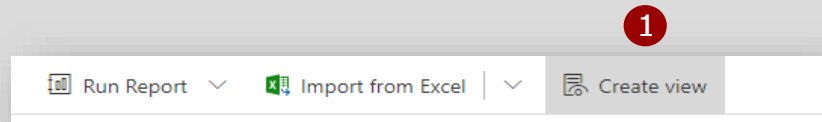**Review the process below to create, save, and access a basic view with new columns and a filter:**
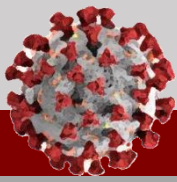
Example: Creating a View

This example creates a simple view with basic filters and columns. *Outreach to Minors*, *Household Contacts*, *and* *View and Downloading Training for Administrators* *show further examples of ways to create and use views.*

1. For this example, you will create a view that shows some monitoring and testing information about your contacts. Start on the Contacts Tab. To create a view, click "Create view" in the upper right corner of the screen. (*Note: depending on the size of your monitor, you may need to click the ellipsis ⋮ to see this button.*) This produces a new screen that will allow you to choose new filters and columns.

2. "Look for" will automatically populate with the name of the tab from which you clicked "Create A View," so in this case, it says "Contacts." *Note: there are options throughout Create A View that are not supported by the system, such as "Business Units" or "Currencies." If you select one of these options, your view will not generate correctly.*

3. "Used Saved View" will automatically populate to "[new]" to show that you are not pulling in any columns or filters from existing views. *Review* *View and Downloading Training* *slides 15-20 for information about using this option to build on existing views.*

4. To customize what column headers you would like to pull into the view, click the "Edit Columns" button.

5. This produces the Edit Columns screen. "Business Phone" is automatically populated. You can remove this column by clicking the column to highlight it and selecting "Remove."

6. To add different columns, click "Add Columns."

1	**"Create view"**
2	**"Look For"**
3	**"Use Saved View"**
4	**"Edit Columns"**
5	**"Remove"**
6	**"Add Columns"**

1 Run Report | Import from Excel | Create view

ADVANCED FIND
Query | Saved Views | Results | New | Save | Edit Columns | Edit Properties | Group AND | Group OR | Details | Download Fetch XML
Show | View | Query | Debug
4
Look for: Contacts **2** | Use Saved View: [new] **3**
Select

Edit Columns
Edit columns for the saved view. These columns represent the data that will be displayed in the view.

Full Name ▲ | Business Phone

View results are displayed here.

Common Tasks
← →
Custom Controls
Configure Sorting
Add Columns **6**
Change Properties
5 Remove

Note: When there are too many columns to fit on a page, the view will be shortened and scrollbars will be added.

OK | Cancel

Review the process below to create, save, and access a basic view with new columns and a filter:

7. You may select as many or as few columns as you would like. For basic monitoring and testing information, you can choose the checkmarks next to:
   a. Contact or Case-Patient
   b. COVID-19 PCR Test Result
   c. Final Monitoring Outcome
   d. Monitoring Status
   e. Referred to Test Date
   f. Test Date

   Click "OK" when you are finished.

8. You may rearrange the columns by clicking each one and then selecting the left or right arrows provided. Click "OK" again.

9. Currently, there are no filters on this view, which means that it would return information about all records in the CCTO Tool. To narrow the records, add a filter by clicking "Select."

10. Choose "Owner" from the dropdown, and "Equals Current User" will automatically populate.

11. You may also wish to add a filter for your location. Click "Select" again and choose "County." In the third column, type the name of your county.

12. Click "Results" to preview the results of your view. Notice that only your county's contacts assigned to you appear and that the columns reflect your choices in "Edit Columns."

13. To save this view for future use, return to the "Advanced Find" Tab.

14. Click "Save As." Name your view and then click "Save."

15. The view will now appear in the Contacts Tab under "My Views" and can be accessed at any time.

7	**Adding columns**
8	**"OK"**
9	**"Select"**
10	**"Owner"**
11	**"County"**
12	**"Results"**
13	**"Advanced Find"**
14	**"Save As"**
15	**"My Views"**