

Guide to Using View Manager

Overview

This document provides a comprehensive guide to Lightning Bolt's new View Manager interface, replacing View Designer. The View Manager tool is for creating or editing views and managing access to views.

Additional support can be found on the [Lightning Bolt Support Page](#) (requires login).

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Viewer and View Manager

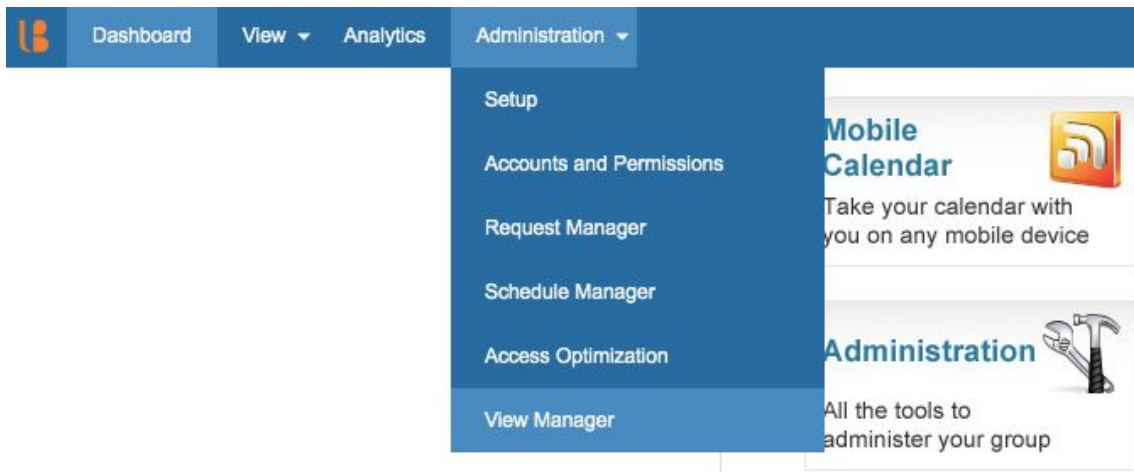
View Manager

View Manager allows you to create, modify, and give access to views that can be used in both Viewer and Editor.

Accessing View Manager

There are three ways to access View Manager:

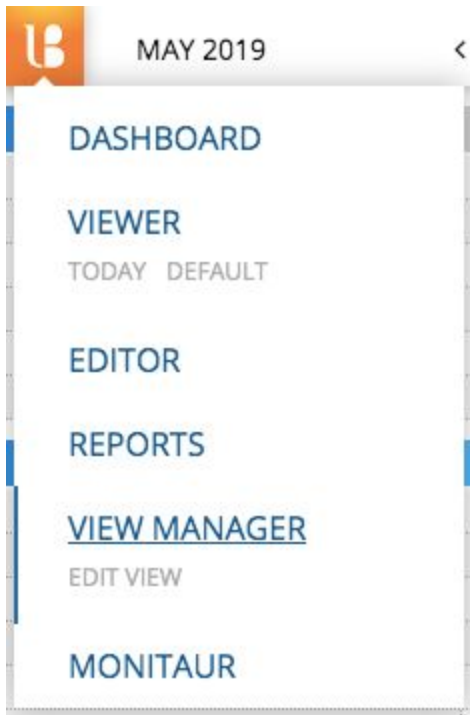
1. From the administration dashboard, navigate to the top menu bar and click [Administration > View Manager](#).



2. From the LBLite dashboard, click the [View Manager](#) icon.



3. From Viewer or Editor, click on the orange LB menu icon in the top left corner and select [View Manager](#) from the dropdown menu.



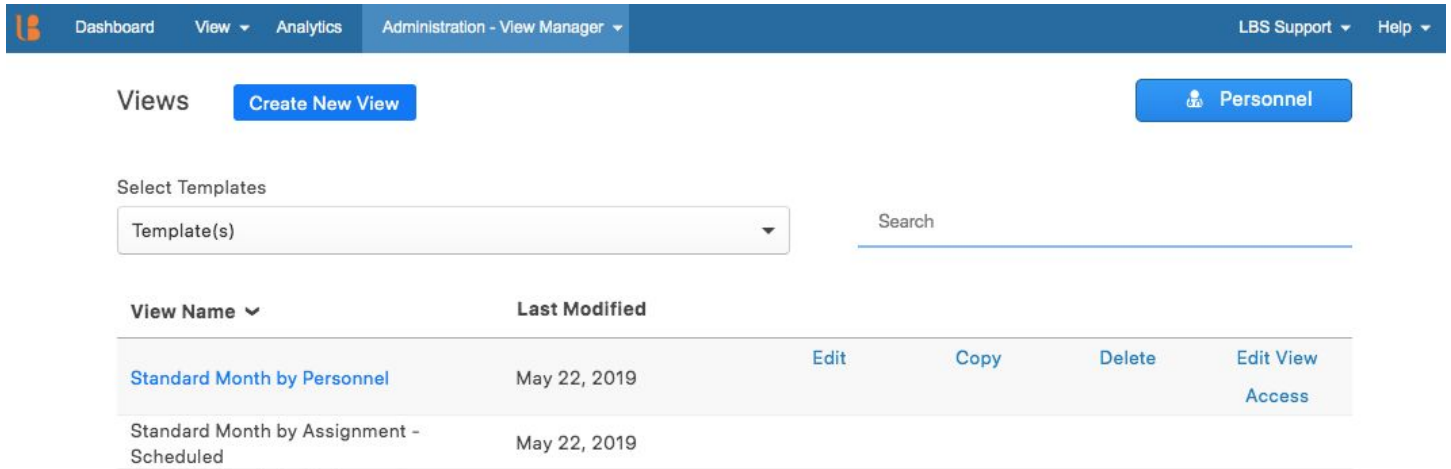
Note: To jump directly to a specific view to make edits, first make sure you are viewing the correct view in Viewer. Navigate to the LB menu and click [Edit View](#) directly under View Manager to jump into editing the view.

Navigating View Manager

View Manager contains three main pages: [Manage Views](#), [Create New View](#), and [Personnel](#).

Manage Views

When you enter View Manager, the home page will be [Manage Views](#). You will see a list of created views and hovering over a view row will highlight additional options to [Edit](#), [Copy](#), [Delete](#), and [Edit View Access](#) of that specific view. Editing View Access is also where you can generate a Public URL link for a specific view.

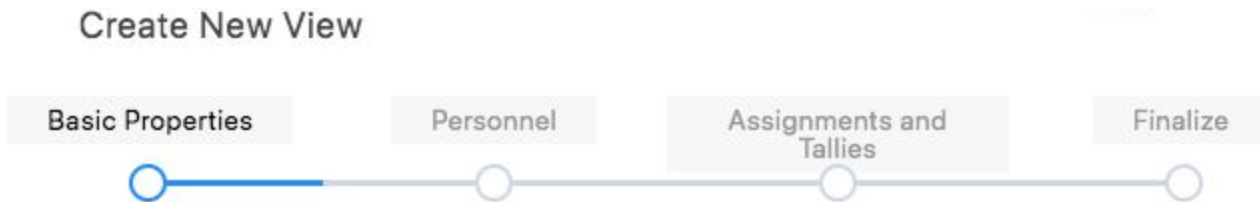


You can narrow down your search of views by using the [Select Templates](#) dropdown on the left or the [Search](#) bar to the right. You can also sort views by clicking the column headers of [View Name](#) or [Last Modified Date](#).

Create New View

To create a new view, click on the [Create New View](#) button next to Views.

The subsequent pages will walk you through the 4 steps of creating a new view: [Basic Properties](#), [Personnel](#), [Assignments and Tallies](#), and [Finalize](#). Navigation of Back, Next, Finish Saving, and Exit are in the bottom right.



Personnel

Use the [Personnel](#) button in the top right to navigate to a page where you can edit an individual's view membership and view access.

You can narrow down your search for a personnel by using the [Select Departments](#) dropdown or by clicking the magnifying glass to extend the [Search](#) bar. You can also sort personnel by clicking the column headers of [Personnel](#) or [Display Name](#). Hover over the row of the individual you would like to [Edit](#) the view access of.

Personnel [Manage Views](#)

Select Departments

1 selected

- Default Department
- Happy Hospitalists
- Scheduling Rules

Appleseed, Jonny

Barton, Clara

Cleveland, Grover

Hide Expired Personnel

Display Name	Edit View Access	🔍
J Adams	Edit	
S Anthony		
J Appleseed		
Barton, Clara	C Barton	
Cleveland, Grover	G Cleveland	

To navigate between these two main sections, use [Personnel](#) and [Manage Views](#) button in the top right.

Creating a New View

To create a new view, navigate to [View Manager](#) and click on the [Create New View](#) button next to Views.

The 4 steps of creating a new view are: [Basic Properties](#), [Personnel](#), [Assignments and Tallies](#), and [Finalize](#).

Basic Properties

The [Basic Properties](#) page is where you establish the visible structure of the view

1. Give the view a name under the [View Name*](#) field. This is required. It is helpful to give the view a brief but descriptive title to differentiate your views.

Create New View > **Standard Month by Assignment**

View Name*

Standard Month by Assignment

Standard Columns Calendar Gantt List Block

Display Range

Month Week

Group By

By Assignment By Personnel

Data Type

Request Schedule Both

2. Choose a view type of [Standard](#), [Columns](#), [Calendar](#), [Gantt](#), [List](#) or [Block](#).

[Standard](#) views display schedule information scrollable vertically through the dates. This is the most used schedule format.

[Columns](#) views display schedule information scrollable horizontally through the dates.

[Calendar](#) views condense schedule information into a calendar, where each slot includes the assignment, personnel, and time.

[Gantt](#) views display schedule information one day at a time, with times to show when personnel are scheduled and how they overlap.

[List](#) views display chosen data fields of schedule information in a quickly searchable format.

[Block](#) views allow translation of blocks based on dates and length of days per block.

- Choose a **Display Range** if the view allows and choose a **Group By** of either **By Assignment** or **By Personnel**. This means that the data in each schedule slot shows the opposite of what you grouped by. For example, if you group by assignment the assignments will show as the header of the rows and the slots will be filled in by the personnel working.
- Choose a **Data Type**. **Request** will show only request data, **Schedule** will show only scheduled data, and **Both** will show both Requests and Schedule data on the same schedule.

Example of a standard view, grouped by assignment showing a display range of 1 month.

MAY 2019		STANDARD MONTH BY ASSIGNMENT					
ASSIGNMENT	Mo 04/29	Tu 04/30	We 05/01	Th 05/02	Fr 05/03	Sa 05/04	Su 05/05
Mammo	OPEN → [T Jefferson]	J Adams	M Curie	A Lincoln	A Lincoln		
Neuro	J Appleseed	J Appleseed	A Earhart	A Earhart	J Appleseed		
Rounder	A Lincoln	E Roosevelt	A Lincoln	S Anthony	R Parks	A Lincoln	G Washington
Surgery	G Washington	Monroe	R Parks	J Adams	T Jefferson		
Admin			J Adams				
Meeting	Monroe						
ASSIGNMENT	Mo 05/06	Tu 05/07	We 05/08	Th 05/09	Fr 05/10	Sa 05/11	Su 05/12
Mammo	M Curie	M Curie	A Lincoln	J Adams	J Adams		
Neuro	J Appleseed	J Appleseed	J Appleseed	J Appleseed	J Appleseed		
Rounder	S Anthony	G Washington	E Roosevelt	E Roosevelt	E Roosevelt	A Hamilton	C Barton
Surgery	G Washington	C Barton	A Hamilton	R Parks	A Earhart		
Admin			J Adams				
Meeting	A Hamilton						
ASSIGNMENT	Mo 05/13	Tu 05/14	We 05/15	Th 05/16	Fr 05/17	Sa 05/18	Su 05/19
Mammo	A Lincoln	A Earhart	J Adams	E Roosevelt	C Barton		
Neuro	OPEN	OPEN	OPEN	OPEN	OPEN		
Rounder	R Parks	A Hamilton	G Washington	G Washington	M Curie	T Jefferson	
Surgery	J Appleseed	E Roosevelt	A Earhart	A Hamilton	E Roosevelt		

Personnel

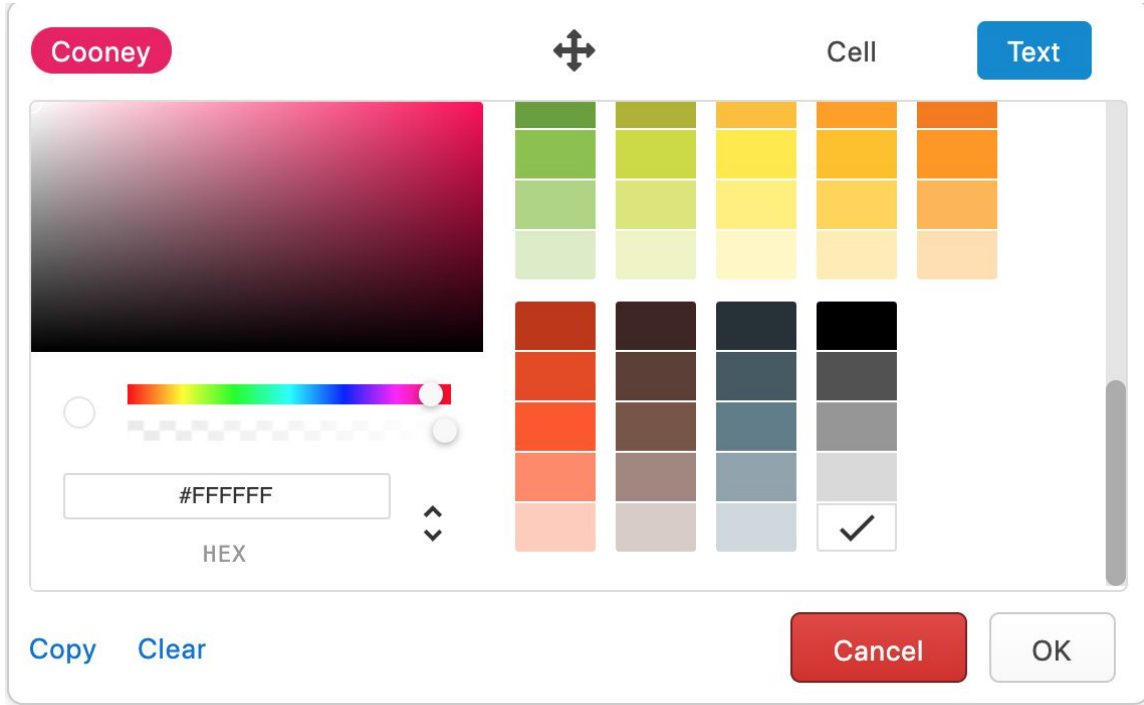
The **Personnel** page is where you select which personnel to include in the view.

1. Use the **Select Departments** (required) and **Select Personnel Types** (optional) dropdowns to retrieve a list of **Available Personnel** to add to your view. Click the the personnel one by one or select **All** button.
2. Once selected, click the right arrow > in the center to move the personnel over to the **Selected Personnel** list. Vice versa, use the left arrow < to move the personnel back.

The screenshot displays the 'Personnel' step in a multi-step process. At the top, a progress bar shows 'Basic Properties', 'Personnel' (active), 'Assignments and Tallies', and 'Finalize'. Below this is a 'Filter Available Personnel' section with three dropdowns: 'Select Departments' (1 selected), 'Select Personnel Types' (All Selected), and 'Personnel Sort Order' (Custom Order). The main area is split into two columns: 'Available Personnel' and 'Selected Personnel'. The 'Available Personnel' list includes names like A Earhart, A Hamilton, A Lincoln (highlighted), C Barton, E Roosevelt, G Cleveland, J Appleseed, and M Curie. The 'Selected Personnel' list includes G Washington, J Adams, Monroe, and T Jefferson. A search bar is present in both lists. Navigation arrows (> and <) are between the lists. On the right of the 'Selected Personnel' list, there is a paintbrush icon and up/down arrows. At the bottom right, there are 'Back', 'Next', and 'Exit' buttons.

3. Once you have aggregated a list of **Selected Personnel** on the right, you can sort the personnel based on the options from the **Personnel Sort Order** dropdown or by **Custom Order** by selecting personnel and using the single or double up and down arrows under the paintbrush. Single arrows move the personnel by one, double arrows move the personnel all the way to the bottom or top of the list.

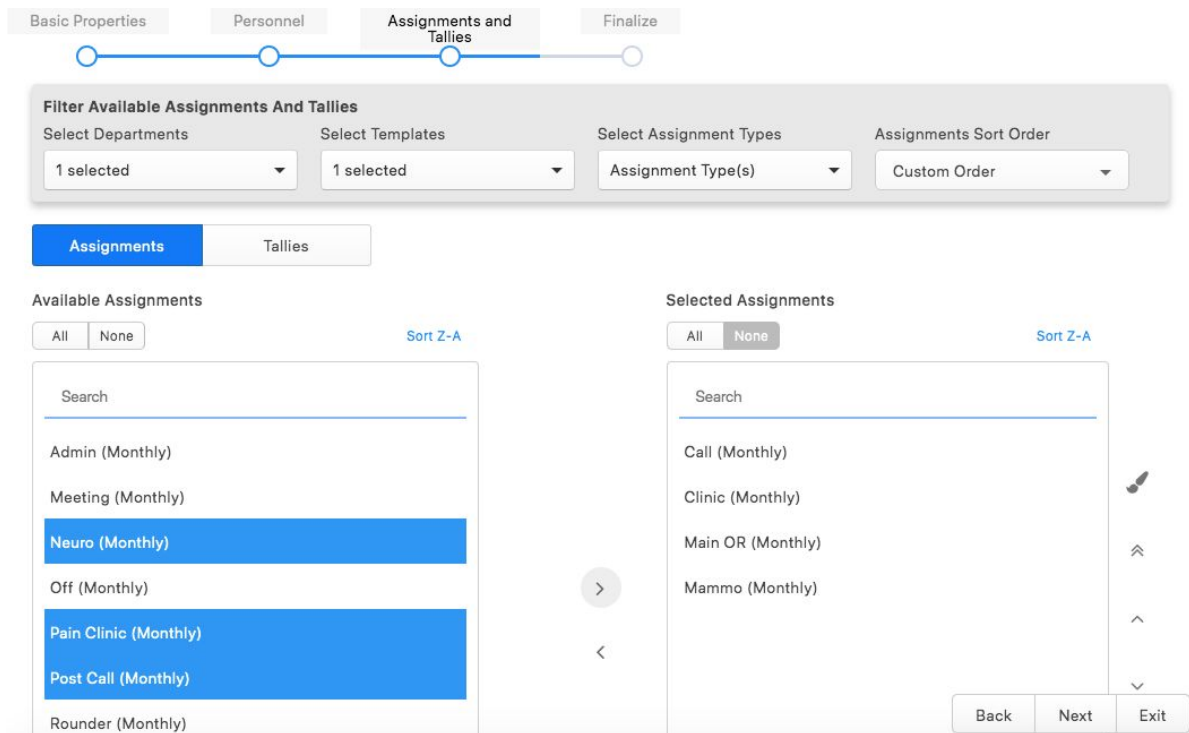
- To edit the cell color of the personnel's slot and the text color of the personnel's name, select the personnel and then click the paintbrush icon. The window that expands will allow you to select either **Cell** or **Text** and then the color that you prefer. Use the pre-created color swatches on the right, drag the white circles on the left to adjust hue and lightness, or enter the HEX string to achieve the color you want. You can **Copy** or **Clear** the color selection before clicking OK.



Assignments and Tallies

The **Assignments and Tallies** page is where you select which assignments and tallies to include in the view.

1. Use the **Select Departments** (required), **Select Templates** (required), and **Select Assignment Types** (optional) dropdowns to retrieve a list of **Available Assignments** to add to your view.
2. Once selected, click the right arrow > in the center to move the assignments over to the **Selected Assignments** list. Vice versa, use the left arrow < to move the assignments back.



3. Once you have aggregated a list of **Selected Assignments** on the right, you can sort the assignments and give their cells or text color, similar to the process from the Personnel step.
4. You can also add tallies to your view by clicking the **Tallies** button to add and manually sort them in a similar process. No cell or text colors are allowed.



Finalize

The **Finalize** page is for adjusting display settings before saving your view. The settings may vary based on what view type you selected in Basic Properties.

1. Use the radio buttons to customize each of the display settings below:

Start Day of Week allows the schedule to start on either Sunday or Monday.

Compact Mode shows the compact name rather than display name of the personnel.

Hide Blank Rows hides any row that does not have anyone scheduled on for the week.

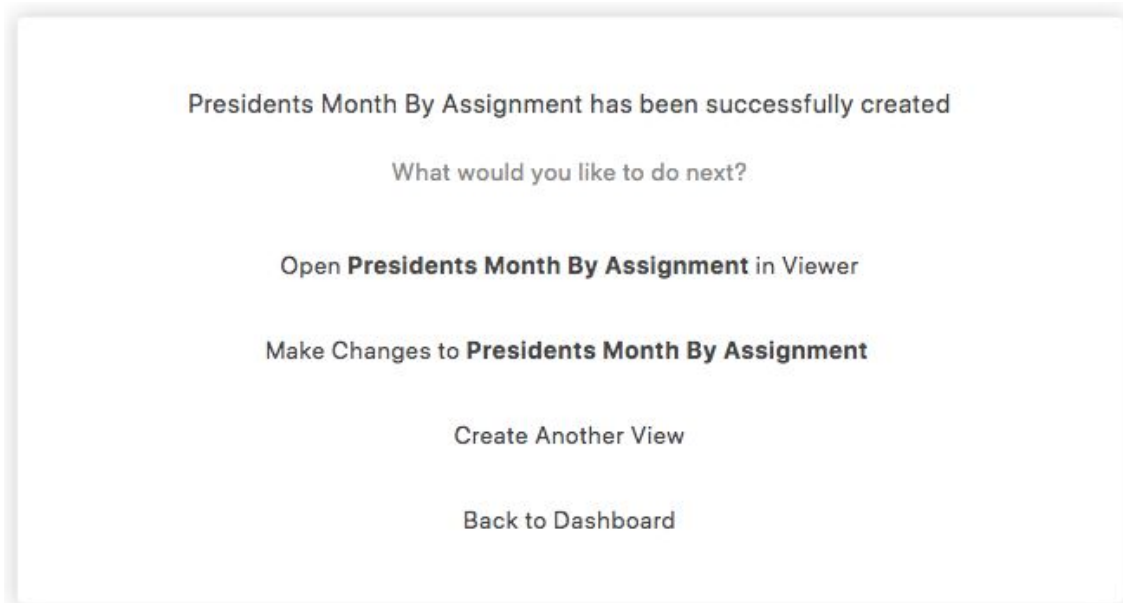
Hide Weekends hides Saturday and Sunday from the schedule.

Hide Pending Slots hides any schedule changes that are pending (have not been approved).

Show Times shows the start and end times of the assignment.

Show Logged in User Only restricts the view so that the logged in user can only view their schedule data.

2. Click **Finish Saving** to complete your view!
3. After saving, you will be brought to a page giving options for what to do next. Open the view in viewer to double check your view. You can always go back and edit your view until it meets your requirements. Make sure that you do not forget to Set View Access, or else no one will be able to see your newly created view.



View Access

There are two ways to edit view access in View Manager. You can manage a specific view's access from the Manage Views page or you can manage a specific individual's views membership and view access from the Personnel page. [View Membership](#) is whether the personnel should be included in the view and [View Access](#) is whether the personnel should have access to the view.

Manage a Specific View's Access

1. Hover over the row of the view you would like to manage and click the [Edit View Access](#) button at the far right.

View Name ▾	Last Modified	Edit	Copy	Delete	Edit View Access
Standard Month by Personnel	May 22, 2019				

2. A panel will extend on the right allowing you view a scrollable list of personnel. A [blue check](#) next to the name means that person has access to the view.

View Access for Standard Month by Personnel

Select Departments

2 selected ▾

Select Personnel Types

Personnel Type(s) ▾

Personnel [Select None](#)

Search

A Earhart ✓

A Hamilton ✓

A Lincoln ✓

B Joel

B Trangle

[Generate Public URL for Standard Month by Personnel](#)

Save Changes

Close

3. You can [Select Departments](#) and [Personnel Types](#) to narrow down the list of personnel you are viewing. You can also search for a specific personnel using the [Search](#) bar.
4. Click the row of the personnel to check or uncheck them as having view access.
5. Once you review the list of personnel who have view access, click [Save Changes](#).

Public URL

You can generate a Public URL link from [Edit View Access](#) panel of a specific view. Anyone who has this link can access this specific view's published schedule data on the web.

1. Click the link at the bottom of the panel and then [Yes](#) from the pop up to generate the URL.

[Generate Public URL for Standard Month by Personnel](#)

2. Copy the link and paste into any webpage to view the specific view's published schedule data.

Public URL for Standard Month by Personnel

<https://sandbox2-lblite.lightning-bolt.com/public/4e889256-bc85-4>

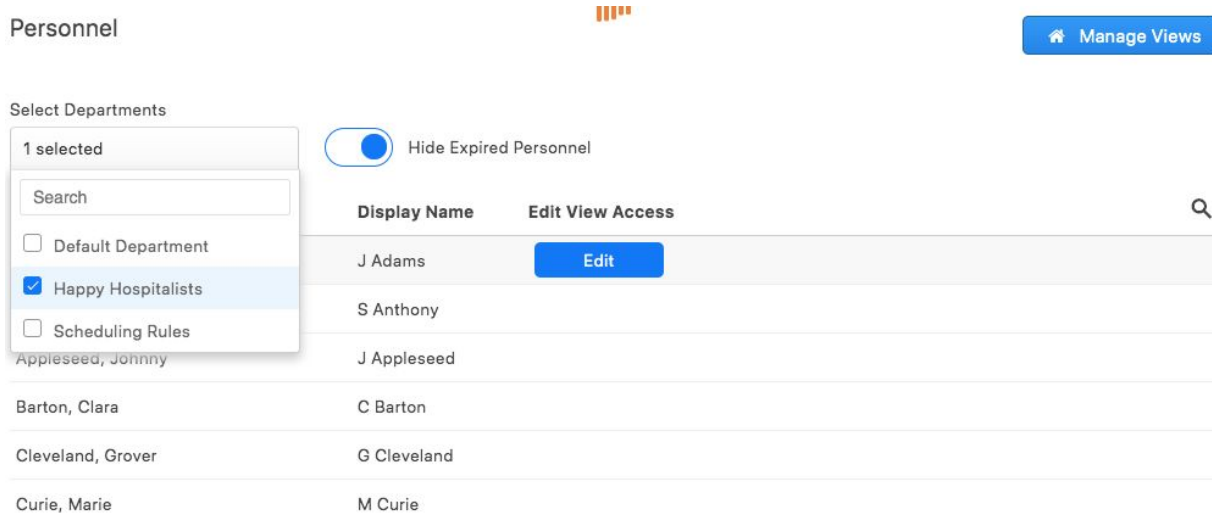
[Copy to Clipboard](#) [Delete](#)

3. You can always click [Delete](#) to remove that URL from the web and regenerate a new unique URL if needed.

Manage a Specific Personnel's View Membership

View Membership is whether the personnel should be included in the view (others who have access to the view can see that personnel's name in the view).

1. Click the **Personnel** button in the top right corner of the View Manager home page.
2. Narrow down your search for an individual by using the **Select Departments** dropdown or by clicking the magnifying glass to extend the **Search** bar.



3. Hover over the row of the individual you would like to edit the view access of and click **Edit**.
4. You will first be brought to the **Manage View Membership** page. This is where you can manage the views that the personnel is a member of.

The **Available Views** column on the left shows the available views that the personnel could be added to. The **J Adams is a Member Of** column on the right shows the views the personnel is already a member of.

You can narrow down your search with the **Select Departments** and **Select Templates** drop downs along with the **Search** bar in each column.

Manage Views For J Adams

Manage View Access | **Manage View Membership**

Select Departments: 1 selected | Select Templates: Template(s)

Available Views | All | None | Sort Z-A

- Search
- Benji Test View
- Block Anchored
- Block Static
- Calendar by Assignment**
- Calendar by Personnel
- List Simple

J Adams is Member Of | All | None | Sort Z-A

- Search
- Columns by Assignment
- Columns by Personnel
- Gantt Day by Assignment
- Gantt Day by Personnel
- Standard Month by Assignment
- Standard Month by Assignment - Request
- Standard Month by Assignment - Scheduled
- Standard Month by Personnel

Save Changes | Exit

5. To give membership of the personnel to an available view, click the name of the view from the **Available Views** panel to highlight it blue. Then click the right arrow > button in the center to move the view to the list of views the personnel is a member of. You can select multiple views at a time.
6. Similarly, to remove the membership of the personnel from a view, click the name of the view from the **J Adams is Member Of** panel. Then click the left arrow < button in the center to move the view to the list of Available Views. You can select multiple views at a time.
7. **Save Changes** at the bottom to confirm.

Manage a Specific Personnel's View Access

View Access is whether the personnel should have access to the view (the specific personnel can view the selected views on Viewer).

1. Click the **Manage View Access** button at the top of the page. This is where you can manage the views that the personnel has access to view.



2. The **Available Views** column on the left shows the available views that the personnel could be given access to. The **J Adams has access to** column on the right shows the views the personnel already has access to.

You can narrow down your search with the **Select Departments** and **Select Templates** drop downs along with the **Search** bar in each column.

Manage Views For **J Adams**

Manage View Access Manage View Membership

Select Departments: 1 selected Select Templates: Template(s)

Available Views

All None Sort Z-A

Search

Calendar by Personnel

Gantt Day by Personnel

Standard Month by Assignment - Request

Standard Month by Assignment - Scheduled

J Adams has access to

All None Sort Z-A

Search

Benji Test View

Block Anchored

Block Static

Calendar by Assignment

Columns by Assignment

Columns by Personnel

Gantt Day by Assignment

List Simple

Standard Month by Assianment

> <

Save Changes Exit

3. To give the personnel access to an available view, click the name of the view from the **Available Views** panel to highlight it blue. Then click the right arrow > button in the center to move the view to the list of views **J Adams has access to**. You can select multiple views at a time.
4. Similarly, to remove the access of the personnel from a view, click the name of the view from the **J Adams has access to** panel. Then click the left arrow < button in the center to move the view to the list of **Available Views**. You can select multiple views at a time.
5. **Save Changes** at the bottom to confirm.