

View Manager

Guide

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Overview

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

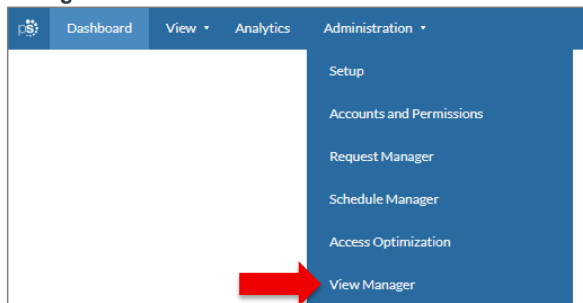
View Manager

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

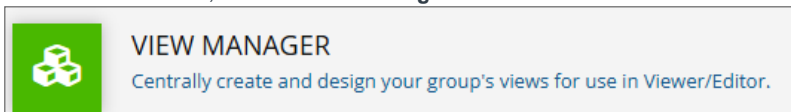
Accessing View Manager

There are three ways to access View Manager:

1. From the administration dashboard, navigate to the top menu bar and click **Administration**, then select **View Manager**.



2. From the LBLite Dashboard, click the **View Manager** icon.



3. From the 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 parts: **Views List**, **Create Views**, and **Personnel**.

Views List

When you enter View Manager, the home page will be **Views List**. You will see a list of created views, along with additional options to **Edit**, **Clone**, **Delete**, **Access**, and **Viewer** of that specific view.

Access is where you can generate a public URL link for a specific view.

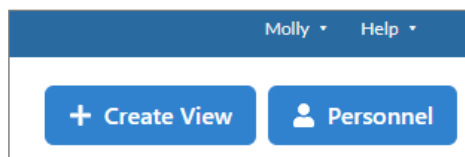
The screenshot shows the 'Views List' interface. At the top, there are tabs for 'Dashboard', 'View', 'Analytics', and 'Administration - View Manager'. Below the tabs, there are filters for 'Departments' and 'Templates', and a search bar for 'Search View Name'. The main content is a table with columns for 'VIEW NAME', 'LAST MODIFIED', and 'PUBLIC VIEW'. The table contains two rows of data.

VIEW NAME	LAST MODIFIED	PUBLIC VIEW					
General: Call by Personnel	2025-05-21	Visit Public View	Edit	Clone	Delete	Access	Viewer
General: Month by Assignment	2025-05-21	No Public View	Edit	Clone	Delete	Access	Viewer

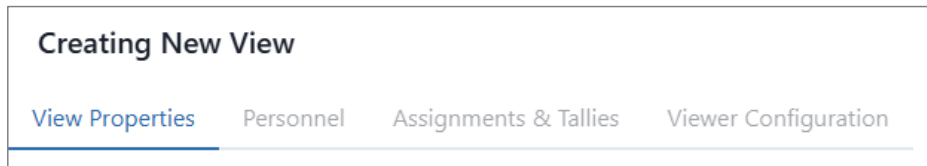
You can narrow down your search of views by using the Select [Departments dropdown](#), [Select Templates dropdown](#) on the left or the **Search** bar to the right. You can also sort views by clicking the column headers of **View Name** or **Last Modified Date**.

Create View

To create a new view, click on the **Create View** button next to Personnel.



The subsequent pages will walk you through the 4 steps of creating a new view: **View Properties**, **Personnel**, **Assignments and Tallies**, and **Viewer Configuration**. Navigation of Exit, Back, Next, and Save are in the top 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 member by using the **Select Departments** dropdown or [by using the Search bar](#). You can also sort personnel by clicking the column headers of **Personnel** or **Display Name**. Once you find the individual, click Edit Access to view and manage them.

Commented [BW1]: The magnifying glass doesn't do anything. It's just an icon for the search bar. So perhaps this segment should read instead "...or by using the Search bar to the right".

Personnel Views List

Departments Hide Inactive Personnel Search Personnel

Select Department(s) Show 50

SELECT	DISPLAY NAME	
<input type="checkbox"/>	Allen, Barry	Edit Access
<input type="checkbox"/>	Anderson, Sonia	Edit Access
<input type="checkbox"/>	Andrews, Garrett	Edit Access

To navigate between these two main sections, use **the Personnel** and **Views List** button on the top right.

Creating a New View

To create a new view, navigate to **View Manager** and click on the **Create View** button next to Personnel.

The 4 steps of creating a new view are: **View Properties, Personnel, Assignments and Tallies, and Viewer Configuration.**

View Properties

The **View 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.

Creating New View

View Properties Personnel Assignments & Tallies Viewer Configuration Exit Back Next Save

View Name *

Departments * **Templates ***

Select Department(s) Select Template(s)

Data Type

Request Schedule **Both**

View Layout

Standard Columns Calendar Gantt List Block

Display Range **Group By**

Month Assignment

Week Personnel

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 present selected schedule data fields in a searchable format, with display options for either a daily or weekly view.
 - i. **Advanced Sorting Rules are used to update the view order.**
 1. Once columns have been selected, click **Advanced Sorting Rules**.
 2. Select the primary column under **Sort by**, then choose additional sort columns by selecting **+ Add another sort column**.
 3. Each column can be sorted by **A to Z, Z to A**, or **Custom**.
 - **Block** views allow translation of blocks based on dates and length of days per block.
3. Choose a **Data Type**.
 - **Request** will show only request data.
 - **Schedule** will show only scheduled data.
 - **Both** will show both Requests and Schedule data on the same schedule.
4. 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.

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

ASSIGNMENT	Mo 07/14	Tu 07/15	We 07/16	Th 07/17	Fr 07/18	Sa 07/19	Su 07/20
Group - Weekdays	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Jason Woods	Dr. Wayne Fucus	Dr. Christopher Smith	Dr. Garrett Andrews	Dr. Garrett Andrews
Group - Weekends						Dr. Jason Woods	Dr. Wayne Fucus
Hospital Call	Dr. Wayne Fucus	Dr. Garrett Andrews	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Jason Woods	Dr. Jason Woods	Dr. Jason Woods
Patient Call	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith
ASSIGNMENT	Mo 07/20	Tu 07/21	We 07/22	Th 07/23	Fr 07/24	Sa 07/25	Su 07/26
Group - Weekdays	Dr. Wayne Fucus	Dr. Christopher Smith	Dr. Jason Woods	Dr. Wayne Fucus	Dr. Christopher Smith	Dr. Jason Woods	Dr. Jason Woods
Group - Weekends						Dr. Jason Woods	Dr. Jason Woods
Hospital Call	Dr. Jason Woods	Dr. Wayne Fucus	Dr. Garrett Andrews	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith
Patient Call	Dr. Jason Woods	Dr. Jason Woods	Dr. Jason Woods	Dr. Jason Woods	Dr. Jason Woods	Dr. Jason Woods	Dr. Jason Woods
ASSIGNMENT	Mo 07/27	Tu 07/28	We 07/29	Th 07/30	Fr 07/31	Sa 08/01	Su 08/02
Group - Weekdays	Dr. Wayne Fucus	Dr. Christopher Smith	Dr. Jason Woods	Dr. Wayne Fucus	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith
Group - Weekends						Dr. Jason Woods	Dr. Jason Woods
Hospital Call	Dr. Jason Woods	Dr. Wayne Fucus	Dr. Garrett Andrews	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith
Patient Call	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith	Dr. Christopher Smith

Personnel

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

1. Use the **Filter Available Personnel by Personnel Type** (optional) and **Sort Selected Personnel Types** (optional) dropdowns to retrieve a list of **Available Personnel** to add to your view.
2. Additional options:
 - a. Toggle **Auto-Add Personnel** on to have future personnel automatically added to this view without manually updating.
 - b. Toggle **Hide Inactive Personnel** on to hide inactive personnel.
3. There are multiple ways to add personnel from the Available Personnel list:
 - a. Click each individual's name to highlight, then click **Add Selected**.
 - b. Click **+** to add the individual to the Selected Personnel list.
 - c. Click **Add All** to move the entire Available Personnel list to the Selected Personnel list.
4. There are multiple ways to remove personnel from the Selected Personnel list:
 - a. Click each individual's name to highlight, then click **Remove Selected**.
 - b. Click **-** to remove the individual from the Selected Personnel list.
 - c. Click **Select All** to move the entire Selected Personnel list to the Available Personnel list.

Creating New View

View Properties Personnel Assignments & Tallies Viewer Configuration

Exit Back Next Save

Filter Available Personnel by Personnel Types Personnel Types Sort Selected Personnel by Custom order

Auto-Add Personnel Hide Inactive Personnel

Available Personnel Search Available

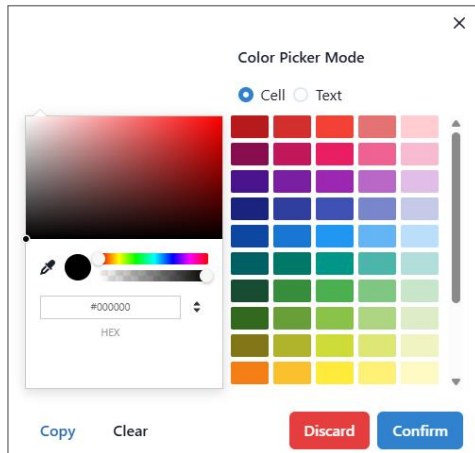
NAME	
Amelia Jones	+
Anthony Henderson	+
Dr. Barry Allen	+
Oscar Washington	+

Selected Personnel Search Selected

NAME		
Dr. Garrett Andrews	-	↕
Dr. Christopher Smith	-	↑
Dr. Don Campbell	-	↓
Dr. Jason Woods	-	↕
Dr. Jessica Howell	-	
Dr. Shaun Thurman	-	
Dr. Sonia Anderson	-	
Dr. Wayne Fiscus	-	

5. After you have added personnel to the **Selected Personnel** list on the right, you can sort them using the **Sort Selected Personnel by** dropdown. Select **Custom Order** to manually update the list. Use the single or double up/down arrows beneath the paintbrush icon - single arrows move an individual one position at a time, while double arrows move them to the top or bottom of the list. You can also quickly reorder the list by dragging and dropping names using the drag handle icon to the left of the individual's name.

- 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 **Confirm**.

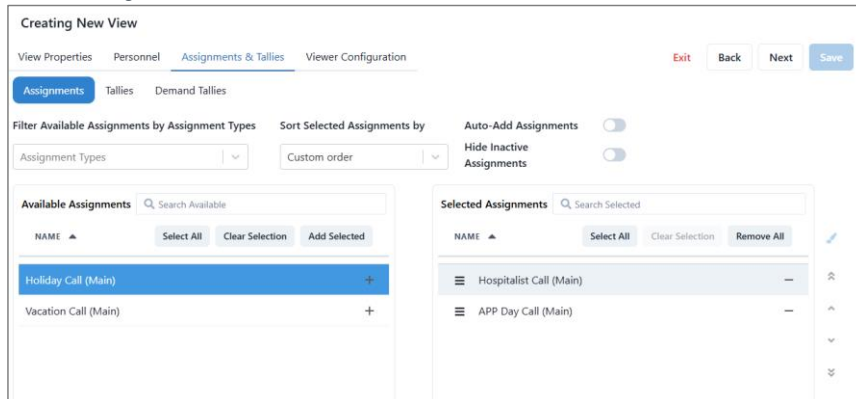


Assignments and Tallies

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

- Use the **Filter Available Assignments by Assignment Types** (optional) dropdown to filter a list of **Available Assignments** to add to your view.
- Additional options:
 - Toggle **Auto-Add Assignments** on to have future assignments automatically added to this view without manually updating.
 - Toggle **Hide Inactive Assignments** on to hide inactive assignments.
- There are multiple ways to add assignments from the Available Assignments list:
 - Click on each assignment name to highlight, then click **Add Selected**.
 - Click **+** to add the individual assignment to the Selected Assignments list.
 - Click **Add All** to move the entire Available Assignments list to the Selected Assignments list.
- There are multiple ways to remove assignments from the Selected Assignments List:
 - Click on each assignment name to highlight, then click **Remove Selected**.
 - Click **-** to remove the individual assignment from the Selected Assignments list.

- c. Click **Select All** to move the entire Selected Assignments list to the Available Assignments list.



5. 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.
6. You can also add tallies to your view by clicking the **Tallies or Demand Tallies** button to add and manually sort them in a similar process. No cell or text colors are allowed.

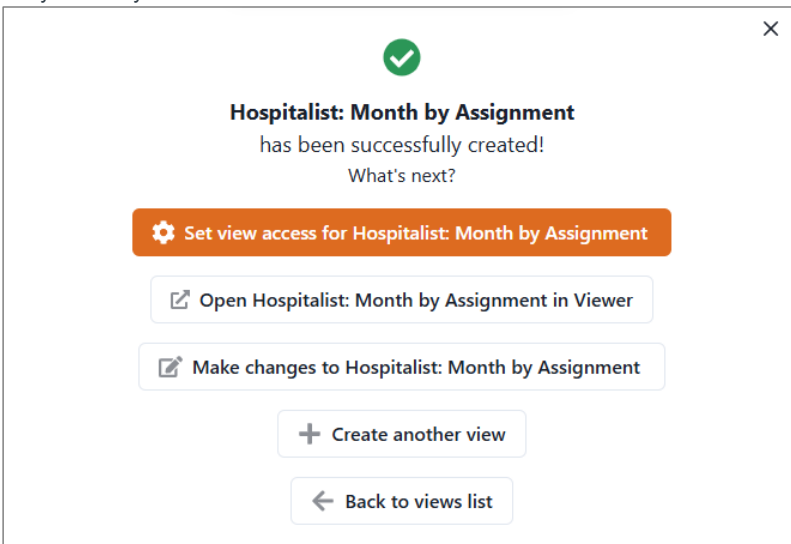


Viewer Configuration

The **Viewer Configuration** page is for adjusting display settings before saving your view. The settings may vary based on what view type you selected in Viewer 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.
 - **Show Department Names** gives you the option to display the department name, compact department name, or to not display it at all in the view.
 - **Compact Personnel and Assignment Names** show the compact name rather than display name of the personnel and assignments.
 - **Hide Blank Rows** hides any row that does not have anyone scheduled for the week.
 - **Hide Weekends** hide Saturday and Sunday from the schedule.
 - **Show Times** shows the start and end times of the assignment.
 - **Enable Saved Filters** allows a user to filter a view by personnel or assignment and save it for future use.
 - **Tallies Count Personnel Based on Filter** will result in the tally count only including personnel included in the filter.

- **Show Logged in User Only** restricts the view so that the logged in user can only view their schedule data.
2. Click **Save** 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 access from the Manage Views page, or you can manage a specific individual's view 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. Locate the view you would like to manage and click the **Access** button at the far right.
2. A panel will extend on the right allowing you to view a scrollable list of personnel. Personnel listed in the **Selected Personnel** means that the individual has access to the view.

Hospitalist: Month by Assignment Access

Departments: 1 item selected | Personnel Types: Select Personnel Type(s) | Exit | Save

Public URL for Hospitalist: Month by Assignment

Generate a new URL | Generate URL

Available Personnel | Search Available

Select All | Clear Selection | Add Selected

NAME	
Amelia Jones	+
Anthony Henderson	+
Dr. Jason Woods	+
Dr. Jessica Howell	+
Dr. Shaun Thurman	+
Dr. Sonia Anderson	+
Dr. Wayne Fiscus	+
Oscar Washington	+

Selected Personnel | Search Selected

Select All | Clear Selection | Remove All

NAME	
Dr. Barry Allen	-
Dr. Christopher Smith	-
Dr. Don Campbell	-
Molly Armstead	-
Dr. Garrett Andrews	-

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 individual using the **Search** bar.
4. Move personnel from the **Available Personnel** to the **Selected Personnel** list to have view access.
 - a. Note: Adding/Removing to the view access is the same process as adding/removing personnel or assignments when creating the view.
5. Once you review the list of personnel who have view access, click **Save**.

Public URL

You can generate a Public URL link from **the 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 **Generate URL** to generate a public URL.

Public URL for Hospitalist: Month by Assignment

| Copy | Delete

2. Copy the link and paste into any webpage to view the specific view's published schedule data.
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 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 **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 using the **Search** bar.
3. Locate the individual you would like to edit the view access of and click **Edit Access**.
4. You will first be brought to the **View Access** page. This is where you can manage the views that the personnel have access to view.
 - The **Available Views** column on the left shows the available views that the personnel could be added to. The **Views accessible by Dr. Barry Allen** column on the right shows the views the personnel already have access to.
 - You can narrow down your search with the **Select Departments** and **Select Templates** dropdowns along with the **Search** bar in each column.

5. 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 **Add Selected** to move the view to the list of views **Views accessible by Dr. Barry Allen**. You can select multiple views at a time.
6. Similarly, to remove the access of the personnel from a view, click the name of the view from the **Views accessible by Dr. Barry Allen** panel. Then click **Remove Selected** to move the view to the list of **Available Views**. You can select multiple views at a time.
7. **Save** at the top to confirm.

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. Toggle the **View Membership** at the top of the page. This is where you can manage views that the personnel is a member of.
2. Narrow down your search for an individual by using the **Select Departments** dropdown or by using the **Search** bar.
3. The **Available Views** column on the left shows the available views that the personnel could be added to. The **Views Dr. Barry Allen is a member of** column on the right shows the views the personnel is already a member of.

Editing view membership for Dr. Barry Allen

View Access: **View Membership** Exit Save

Departments: Templates:

Available Views Select All Clear Selection Add Selected

NAME	
Holiday: Assignment by Personnel & Holiday	+
PMG After Hours: Standard by Assignment	+

Views Dr. Barry Allen is a member of Select All Clear Selection Remove Selected

NAME	
General: Call by Personnel	-
General: Month by Assignment	-
General: Month by Personnel	-
Hospitalist: Month by Assignment	-
Hospitalist: Monthly by Assignment	-

4. 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 **Add Selected** to move the view to the list of views the personnel is a member of. You can select multiple views at a time.
5. Similarly, to remove the membership of the personnel from a view, click the name of the view from the **Views Dr. Barry Allen is a member of** panel. Then click **Removed Selected** to move the view to the list of Available Views. You can select multiple views at a time.
6. **Save** at the top to confirm.