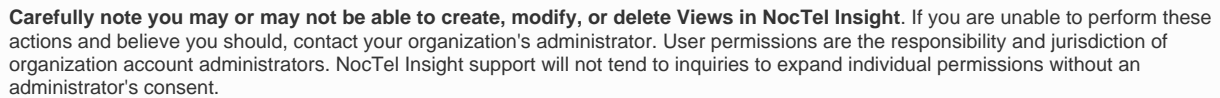# Using Views For Fast Navigation and Convenience

A **View** in NocTel Insight allows you to set filter and parameter values across one, multiple, or all Reporting Worksheets within a Reporting Workbook. When a View is created and saved, it can be returned to at any time to reload the Reporting Workbook and render reports with the filter and/or parameter values that were set and saved.

This makes Views an incredibly useful tool to set frequently used reporting contexts for yourself, such as creating a View for each relevant NocTel Talk Extension Class or the NocTel Flow Call Volume for a specific selection of Queues. By creating, saving, and loading Views, you save yourself the effort of making the necessary selections in filters and parameters. You make those selections *once* and then the process becomes a matter of a couple clicks.

Views also have a couple other useful functionalities. When you create and save a View, you can set the View (or the currently loaded View) as your **default view**. This is done by checking the box located under the View title field. Views can also be made **public**, which is done by checking the "make public" checkbox under the View title field. Public views are visible and selectable by any users who have the same access privileges to the Reporting Workbook the View was created for. This is a powerful way to standardize what users see in regard to reporting across the board, and helps eliminate discrepancies caused by different users using different filter, parameter, and date range settings.

> (i) **Carefully note you may or may not be able to create, modify, or delete Views in NocTel Insight**. If you are unable to perform these actions and believe you should, contact your organization's administrator. User permissions are the responsibility and jurisdiction of organization account administrators. NocTel Insight support will not tend to inquiries to expand individual permissions without an administrator's consent.

Setting Up a View

To start, we presume you have just loaded a report - you may or may not have a customized Default View set. This is not particularly important. The below image is an example of what you may see when first loading a report:


Note the orange highlighted regions. A customized Default View will likely be based on a date range, which our example uses. Also note the highlighted region in the upper section of the example - this will tell you the name of the View that is **currently active**. Non-custom Default Views will default a View simply named "default".

Step 1: Modify Filters, Parameters, and/or Date Ranges for the View

When you create a View of your own, you are changing the current filter, parameter, and/or date range selections for one or more reports.

In the example to the right, the **Set Relative Date** control has been selected and modified to use a different relative date than what the Default View loaded and used. In our example, we change this from "This Week" to "Previous Month". Note in the upper region that the name of the View currently being used **has not changed**.
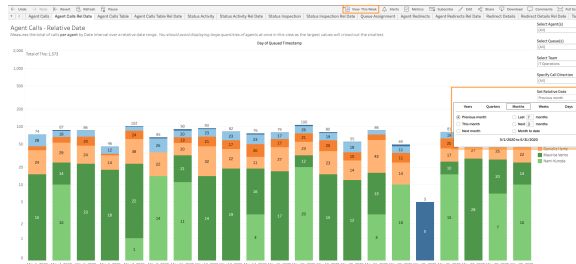
Compare the rendered data in the example to the right to our original Default View data above. Visibly there are more days' worth of data being rendered.

We can change other filters, parameters, etc. anytime at this point - and again, not limited to just a single report. Although we are making changes to the currently loaded View, these changes are not kept. This is visually indicated with a * (asterisk) mark next to the View icon highlighted in the upper region. While we have changes made and they are taking effect now, we have not saved them as changes to our current View or to be saved as a new View altogether.

Step 2: Create and Save the View

When you have made the selections for filtering, parameters, and date ranges that suit what you require for your View; it is now time to save the View. Keep in mind you can save changes to either **override the current View** or create a new View. Again, an * next to the View icon in the upper region of the interface will indicate there are unsaved changes.

To save the View, click on the View's icon or the region displaying the name of the View. This will bring up a popup window as indicated in the example below.
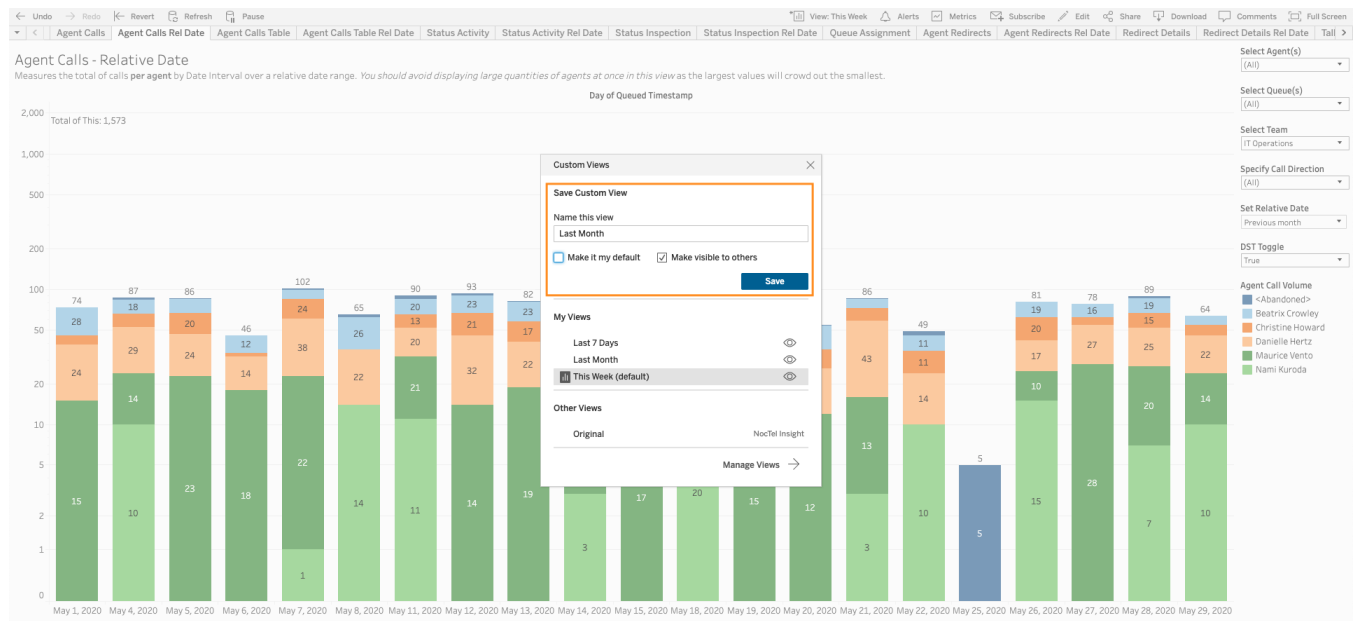
At the Custom View popup window, you can perform several actions. The steps below describe the broad scenarios:

You Want to Update an Existing View

1. Do NOT change the View's name
2. Select/deselect the Make It My Default and/or Make It Public options to suit visibility and personal preferences
3. Hit the Save button

You Want to Create a New View

1. Set a unique View name. If you intend to make the View public, be careful to avoid naming collisions
2. Select/deselect the Make It My Default and/or Make It Public options to suit visibility and personal preferences. These can be changed anytime after saving by selecting the View icon again while the View is active
3. Hit the Save button

When you save a View, NocTel Insight notes all the filter, parameter, and date range settings you applied to all reports within a Workbook. Be aware that due to the synchronization that occurs between many filters and parameters in reports, the Date Range or Relative Date you most recently set in a report will be the one applied.

Step 3: Verify Your View

It's always a good idea to double check that your View was saved as you specified. Remember: the View's setting applies to all reports within the Workbook you modified before saving.

Consider the two examples below. On the left is our original View that was defaulted to when we loaded our report. You can see from the rendered stacked bars in the background that a few days' worth of data was loaded since it was on the basis of "This Week". The relevant control as well as the Default View's name are highlighted. In this example on the left, we can see the Custom Views popup again indicating we've clicked the View icon. From here we see the "Last Month" View that was created in our above example steps.

Clicking on the "Last Month" View from here will load that View, which we see on the right below. And indeed, we see the Set Relative Date has changed from "This Week" to "Previous Month" and in the upper region we see the View name is now indicating "Last Month" which is what we named the example View created above.
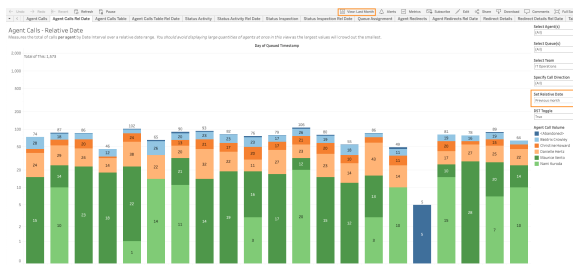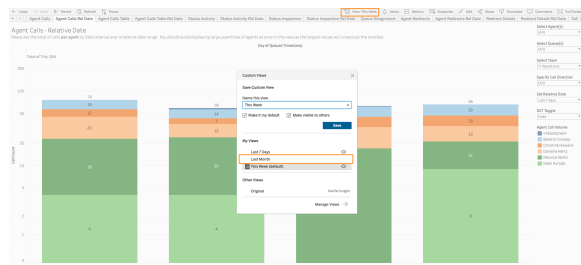
Best Practices Managing and Using Views

- If you are creating a View with the intent of making it public for a team or group of individuals, we recommend making a copy of the View that is not set to Public. Depending on the permissions settings of your organization, another user could delete your public view. If this happens and you have a private View copy saved, you can use that to create a new public version of the View to recover.
- Views do **not** apply across Reporting Workbooks. All content and settings in Reporting Workbooks are isolated from one another. You cannot copy a View from one Reporting Workbook to another.
- Avoid using absolute date ranges for custom Views - always use relative date counterparts of reporting since these will always update relative to the newest data. The exception is if there is a specific date range you wish to be able to reference back to easily at a later time.
- There is a happy medium between a custom View that does too little and one that does too much. We recommend basing custom Views around date ranges or particular grouping of interest, such as reporting based around a specific Team of agents in NocTel Flow.