View Designer

User Guide

Version: 7.7

Written by: Documentation Team, R&D
Date: Friday, February 13, 2026

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What is View Designer?

View Designer gives Perceptive Content administrators the ability to create and manage views.

In View Designer, you can set up the conditions, display settings, and user access that give views their power, versatility, and convenience.

View Designer toolbars

The following tables identify the toolbars available in View Designer, which are used to create and manage your views.

View Designer toolbar

Tool	Name	Description
	Save	Lets you save changes to a view, which includes any of the view's filters.
	Properties	Lets you activate or deactivate a view, grant view privileges to users and groups, specify the maximum number of rows that a view can display, and designate whether the view is run manually or automatically.

View condition toolbar

Tool	Name	Description
	Add condition	Displays a dialog box that lets the user insert a new row into the

Tool	Name	Description
		condition list of the view. If it is the not the first condition in the list, the condition begins with the AND operator.
	Cut	Enabled if you have selected any conditions. Clicking Cut then removes the conditions and places them on the Clipboard.
	Copy	Enabled if you have selected any conditions. Clicking Copy then places them on the Clipboard.
	Paste	Enabled if you have any conditions on the Clipboard. Clicking Paste then inserts them at the bottom of the condition list.
	Delete	Enabled if you have selected any conditions. Clicking Delete then removes the conditions without placing them on the Clipboard.
	Group	Enabled if you have selected two conditions. Clicking Group then removes the lower condition and adds it to the end of the upper condition with parentheses where appropriate.
	Ungroup	Enabled if you have selected a grouped condition. Clicking Ungroup then separates the grouped condition by removing the rightmost condition and inserting that condition in the row below the selected condition.
	Move Up	Enabled if you have selected a single condition below the top row. Clicking Move up then causes the selected condition to trade places with its upper

Tool	Name	Description
		neighbor.
	Move Down	Enabled if you have selected a single condition above the bottom row. Clicking Move down then causes the selected condition to trade places with its lower neighbor.

Filter toolbar

Tool	Name	Description
	New Filter	Adds a new public filter definition to the selected view.
	Copy Filter From	Lets you make a copy of filter from a different view but not from the current view. Only public filters are available for copying.
	Publish	Enabled when you have a private filter selected. Clicking Publish changes that filter to a public filter.
	Properties	Enabled when you have a public filter selected. Clicking Properties lets you edit the filter name and description.
	Delete	Enabled when you have a public filter selected. Clicking Delete removes the filter from the view. You can also delete all private filters for a user by clicking the user name and clicking Delete.

Preview toolbar

Tool	Name	Description
	Run	Lets you display the result set of the current view or filter definition.
	Preview variables	Lets you substitute a different user or date and time in place of the current user or date and time, so that you can simulate run-time conditions to test a view or filter definition that contains a variable in at least one of its conditions.
	Columns	Lets you define the arrangement of columns in which the result set is displayed to the user.
	Statistics	Lets you define statistics that provide calculations for the view results.
	Open Find bar	Opens a Find bar that allows you to perform a character search.

Frequently asked questions about views

The following discussion addresses the most common concerns of users familiar with versions of Perceptive Content before view definitions were available.

Can I create a view that shows all my documents, folders, and tasks?

Yes. When you install Perceptive Content, two default views are already in place that do this: All Documents and All Folders. You can modify or remove these views. If you have Records Manager privileges, two additional default views are also already in place: All Records and All Record Folders.You can also modify or remove these views. You cannot create task views. A list of default task views, including All Tasks also appears. You can modify, but not delete this view.

Can I limit access to a view by user or group?

Yes. You can allow either users or groups or both to see the contents of a view. You can also selectively grant the ability to save private filters and edit the view definition.

Can a user have access to more than one view?

Yes. You can build any number of special-purpose views that together comprise the user's access to content.

Can I perform numerical and date sorts of items as opposed to alphabetical (string) sorts?

Yes. When the values are stored in custom properties of the data type you need (number, date, flag, user, or string).

How do I select a condition when editing a view or filter?

Click in the vertical bar to the left of the condition row.

Can a user further limit the number of items displayed in a view?

Yes. Using either the Search or Quick Search tab. Furthermore, if granted the Filter privilege, the user can save a private filter, along with any additional column formatting that accompanies the filter.

Can a user display items that don't satisfy the conditions of a view definition?

No. No user searching technique can display more documents or folders in a view than the view was originally defined to display. The same idea holds true for records and record folders in view, assuming you have Records Manager privileges. However, if you grant view management privileges to a user, the user can then change the view definition to return more or different results.

What happens if a view includes documents that have drawer or document type values for which the user does not have access privileges?

Those documents do not appear in any of the views available to the user. Similarly, assuming you have Records Manager privileges, if a view includes records that have files plan or record type values for which the user does not have access privileges, those records do not appear in any of the views available to the user.

Can I create filters that can be applied by any user who can see the associated view?

Yes. These are called public filters. You can define them by setting up conditions yourself or by publishing a user's private filter. Any private filter can be viewed and published in View Designer.

Does Perceptive Content automatically refresh the view grid whenever a change occurs to any of the items in the view?

No. Unless the user is adding a document to version control or moving a document to another folder, the user must manually refresh the view or filter or rerun the view by clicking the Go button. The same idea holds true for records and record folders in the view grid, assuming you have Records Manager privileges.

When I create a variable condition with custom properties in the Constrain By box, I don't see all of the custom properties I created.

Custom properties with the data types of flag and number cannot be used in a variable condition.

Can I create or delete a task view?

No. Default task views are installed with Perceptive Content and cannot be deleted. New task views cannot be created; however, you can modify existing task views and create public filters to narrow the task view results.

How are workflow views created?

Perceptive Content automatically creates a view for each queue a user can access. Workflow queue views can be modified in Workflow Designer and workflow managers can create public filters.

Work with views

What is a view?

A view is a predefined set of criteria you can use as a basis to search for content.

A view contains just the content you need to work with. Because a view is a subset of all content that is tailored for you, the view can hide dozens, hundreds, or even thousands of results that might otherwise clutter your search results list. Views display only the columns you need to see or work with, including custom property columns. In addition, your view is customized so that the appearance, name, and width of columns fit your needs.

A view displays a set of results that are arranged according to the content you wish to create for your users. Views can include any of the following components:

- A condition forms the part of a view or filter that controls which items, containers, or tasks are returned in a view.
- A filter is an optional component of a view that serves as a saved search which narrows the view results.
- A column layout defines column order, sorting, and appearance for a view or a filter.
- Statistics are calculations such as the maximum, minimum, and average of all the values in a specific column.

What is a related view?

A related view establishes a relationship view for an item.

When a user selects a related view to apply to an active item, the relationship displays items that match the item with respect to the conditions you define for a related view.

Suppose you want to select a related view to apply to an item. For example, you want to view a student information document with a Field2 value that contains the student's ID number. You also want to see all the other items with the same Field2 value. You can create a normal condition for this view, and the Related pane displays any other item that has a Field2 value that matches the student ID number in the active item.

For folders, related views match the condition on folder properties. For example, suppose you work at a hospital. Your environment is set up so that each time a patient visits the hospital, a new folder is created and contains all documents related to that visit. If a patient makes a return visit, that patient will have two folders, one for each visit. You view a recent patient's visit and realize you need to see all other folders from past visits. You can create the conditions for this relationship, and then see all folders that correspond to the patient's identification code and open any folders you need to view.

The Related pane also displays three copied relationships in ImageNow Client, if the relationships are active.

- The Copies of Original relationship returns all items copied from the same original item as the copied item that is active in ImageNowViewer.
- The Copies of this relationship returns all items copied from the same original item when the original item is active in ImageNowViewer.
- The Original relationship returns the original item when the copied item is active in ImageNowViewer.

You can add key and custom property columns to a copied item s relationship, but you cannot modify it in View Designer.

Types of views

The following list summarizes views available in Perceptive Content, including views created by you, your view manager, and views created automatically by the Perceptive Content system.

Application Plan

An application plan view returns a set of documents captured using a specific application plan. Application plans that do not have a defined view action do not display results.

Modifiable components

View conditions

Column layout

View statistics

Sorting and grouping

Security considerations

Users with application plan management privileges can modify application plan views, including view actions and components, in Application Plan Designer.

Users with the View privilege for the application plan can run the view. For the active business application plan screen, the view returns the associated results.

Batches

A batch view returns the batches in your Perceptive Content system. By default, batch users can see all batches, batches that are ready for QA, and batches that are ready for linking.

Modifiable components

Column layout

Sorting and grouping

Document

A document view returns a set of documents. Document views appear in the Views pane under Documents.

Modifiable conditions

View name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with view access can run a document view.

File Plans

A file plan view returns a set of records within a particular record category or record folder. File plan views appear in the Views pane under File Plans, and are organized according to the hierarchy of file plans, record categories, and record folders in the system. When you select one of these items, Perceptive Content retrieves the set of records within that item.

ImageNowExplorer uses the system-defined view and it cannot be modified. You can modify a view during a viewing session, but you can t create and save filters or views for file plan view.

File plan view does not use Quick Search, only Advanced Search.

Modifiable components

View conditions

Column layout

Sorting and grouping

Security considerations

In the views tree, users see only the file plans for which they have been granted Search privileges, and the record categories and record folders for which they have been granted Use privileges.

Folder

A folder view returns a set of folders. Folder views appear in the Views pane under Folders.

Modifiable conditions

- View name
- View privileges
- View conditions
- Public filters
- Private filters
- Column layout
- View statistics
- Sorting and grouping

Security considerations

- Users with view access can run a folder view.

Folder content

When the user opens a folder, Folder Viewer displays a secondary grid that lists the folder's contents. This secondary grid is called a folder content view. Because document and folder shortcuts can belong to any number of folders, the same document or folder might appear as a representation in Folder Viewer with different grid layouts, depending on the type of folder the user opens.

Changes you make apply to all folders associated with the modified folder type. Because you can represent a document or folder using shortcuts in any number of folders, the same item might appear in a folder content view with different grid layouts, depending on the folder's type.

Modifiable conditions

- Column layout
- View statistics
- Sorting and grouping

Security considerations

- Users with folder type management privileges can modify components of the folder content view in Management Console.

Recently received documents

Recently received documents appear in a temporary view that appears when one Perceptive Content user transfers documents to another user with the Send to User feature. This transfer must occur while both users are connected to the same ImageNow Server. The view sorts the received documents according to the name of the sending user and the time they were sent.

Record

To view records functionality, you must install a Records Manager license.

A record view returns a set of records. Record views appear in ImageNowExplorer, in the Views pane under Records.

Modifiable conditions

- View name
- View privileges
- View conditions
- Public filters
- Private filters
- Column layout
- View statistics
- Sorting and grouping

Security considerations

- Users with view access can run a record view.

Record Folder

A record folder view returns a set of record folders and record categories. Record Folders views appear in ImageNowExplorer, in the Views pane under Record Folders.

Modifiable conditions

- View name
- View privileges
- View conditions
- Public filters
- Private filters
- Column layout
- View statistics

Sorting and grouping

Security considerations

Users with view access can run a record folder view.

Record Folder Content

When the user opens a record folder, Record Folder Viewer displays a secondary grid that lists the folder s contents. This secondary grid is called a record folder content view. Because record folder shortcuts can belong to any number of record folders, the same record folder might appear as a representation in Record Folder Viewer with different grid layouts, depending on the type of record folder the user opens. Changes you make apply to all record folders associated with the modified record folder type.

Modifiable conditions

Column layout

View statistics

Sorting and grouping

Security considerations

Users with record folder management privileges can modify components of the record folder content view in Management Console.

Recycled documents and document folders

When the user deletes a document or folder, Perceptive Content moves the item to a system view called My Recycled Documents or My Recycled Folders.

Items remain in the recycled view for the number of days that you specify in the *inserverFS.ini* file.

Modifiable conditions

Private filters

Security considerations

If the user is a Department Manager, two additional views appear. These views, All Recycled Documents and All Recycled Folders, display all items deleted by all users. As long as the user can see a recycled document or folder, the user can restore it to its previous state, at which time the document or folder keeps the attributes it had before deletion, if possible.

Related

Related views appear in the Related Documents pane of the document viewer and in the Related Folders pane of the folder viewer. A related view applies the relationship selected in the list to the current document or folder. The view displays a list of all documents or folders that satisfy the conditions of the relationship.

Modifiable conditions

- Relationship name
- View privileges
- View conditions
- Public filters
- Private filters
- Column layout
- View statistics
- Sorting and grouping

Security considerations

Users with document view management privileges can create and modify document relationships in Management Console. Users with folder view management privileges can create and modify folder relationships in Management Console.

Task

A task view returns a list of tasks assigned to the user according to the type of task, such as My Assigned or To Review. Task views appear in the Views pane under Tasks.

Modifiable conditions

- Public filters
- Private filters
- View statistics
- Column layout
- Sorting and grouping

Workflow process

A workflow process view returns a list of items (representing documents or folders) when the user accesses a workflow process, which appears in the Views pane under Workflow.

Modifiable conditions

- Private filters

Security considerations

Workflow process views appear automatically depending on the workflow queues for which a user has the necessary privileges. Users with workflow process management privileges can modify workflow queue view components in Workflow Designer.

Security considerations

Users with view access can run a folder view.

Workflow queue

A workflow queue view returns a list of items (representing documents or folders) when the user accesses a workflow queue, which appears in the Views pane under Workflow.

Modifiable conditions

Column layout

View statistics

Private filters

Grouping and sorting

Security considerations

Workflow queue views appear automatically depending on the workflow queues for which a user has the necessary privileges. Users with workflow process management privileges can modify workflow queue view components in Workflow Designer.

Change whether a view runs automatically

You can designate whether the results of a view appear as soon as the user selects the view, or whether the user can filter the view before running it. To change whether a view runs automatically, complete the following steps.

1. In **View Designer**, on the **Designer** toolbar, click the **Properties** button.
2. In the **View Properties** dialog box, on the **General** tab, do one of the following actions:
    1. To display results as soon as the user selects the view, select the **Automatically run this view** check box.
    2. To allow the user to create or select a filter before clicking the **Go** button, clear the **Automatically run this view** check box.
3. Click **OK**.

Set search behavior for a view

You can reset the search method and values displayed for a view in the search results grid. To set search behavior for a view, complete the following steps.

1. In **View Designer**, on the **Designer** toolbar, click the **Properties** button.

2. In the **View Properties** dialog box, on the **Search** tab, in the **Method** list select **Search** for a multi-condition search, or **Quick Search** for a single-condition search.
3. If you selected **Quick Search**, do the following substeps.
    1. In the **Field** list, select the item, container, or task property to display by default.
    2. In the **Operator** list, select the operator that will compare the value in Field selected above to the value or values provided by the user.
4. Click **OK** and then, in the **Designer** toolbar, click the **Save** button.

Activate or disable a view

To make a view active or to disable a view open in View Designer, complete the following steps.

1. In **View Designer**, in the **Designer** toolbar, click the **Properties** button.
2. In the **View Properties** dialog box, on the **General** tab, do one of the following options:
    - To make the view visible to users with appropriate privileges, select the **Is active** check box.
    - To hide the view from the Views pane, clear the**Is active** check box.
3. Click **OK**.

Set the maximum number of results

To configure the maximum number of search results a view can return at one time, complete the following steps.

You cannot perform this procedure for task views.

1. Do one of the following actions, depending on the situation:

Situation	Steps
Set maximum results for an item, container, or view.	1. In **View Designer**, in the **Designer** toolbar, click the **Properties** button. 2. In the **View Properties** dialog box, click the **General** tab.
Set maximum results for a folder view	1. In **Management Console**, in the left pane, click **Folder Types**. 2. Select the folder type and click **Modify**. 3. In the Type - <*Container Name*> dialog box, click the **Appearance** tab.
Set maximum results for a record container view	**Note:** To view records functionality, you must install a Records Manager license.

Situation	Steps
	1. In **Management Console**, in the left pane, click **Records** then select **Record Category Types** or **Record Folder Types**. 2. Select the record container type and click **Modify**. 3. In the Type - <*Container Name*> dialog box, click the **Appearance** tab.
Set maximum results for a workflow queue view	1. In **Workflow Designer**, double-click the queue. 2. In the **Queue Properties** dialog box, click the **Appearance** tab.
Set maximum results for a workflow process view	• In **Workflow Designer**, click **File > Properties**.

2. In the **Maximum Results** box, type or select the number of rows, which can be between 100 and 2,000.
3. Click **OK**.

Set the system default view

You can set the system-wide default view to use a link that does not specify which view to use, and the user does not have a default view configured. To set the system default view, complete the following steps. You must be a department manager to set the default system view.

You can also set the default view on a per-user basis in Management Console.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, select **Views**.
3. In the right pane, select the **System Defaults** tab.
4. In the **Document view** list, select a default document view.
5. In the confirmation prompt, click **Yes**.

> **Note:** Select **None** from the list to remove the default document view.

6. In the **Folder view** list, select a default folder view.
7. In the confirmation prompt, click **Yes**.

> **Note:** Select **None** from the list to remove the default folder view.

Create a view

To create a new view, complete the following steps.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, click the appropriate tab, and then click **New**.
3. In the **New View** dialog box, define a name and description for this view and click **OK**.

Next Modify the view in View DesignerManagement Console to define conditions, column layout, filters, and view security.

Create a related view

To create a relationship view for an item, perform the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, on the **Related** tab, click **New**.
3. In the **New Relationship** dialog box, type a name and an optional description of the view that appears in the Tool Tip for the view, and then click **OK**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Copy a view

You can copy a view to create a new view with the same conditions, filters, column layout, and security settings. To copy a view, perform the following steps.

You cannot copy a task view.

1. In **Management Console**, in the left pane, click **Views**.
2. On the appropriate tab, select the view definition and click **Copy**.

   To view records functionality, you must install a Records Manager license.
3. In the **Copy View** dialog box, type a name and optional description for the new view.
4. Optional. To copy public filters associated with the original view definition, select the **All public filters** check box.
5. Optional. To copy users and the view privileges associated with the original view definition, select the **All users and their privileges** check box.
6. Optional. If you included users and you also want to copy any private filters created by those users, select the **Private filter for users** check box.
7. Click **OK**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Rename a view

To rename a view, complete the following steps.

You can also rename a view by editing its properties in View Designer. You cannot rename a task view.

1. In **Management Console**, in the left pane, click **Views**.

2. In the right pane, on the appropriate tab, select the view you want to rename and click **Rename**.
3. In the **Rename View** dialog box, type the new view name and an optional description.
4. Click **OK**.

Delete a view

To delete a view, perform the following steps.

1. In **Management Console**, in the left pane, click **Views**.
2. On the **Document**, **Folder**, **Record**, or **Record Folder** tab, select the view and click **Delete**.
   To view records functionality, you must install a Records Manager license.
3. In the confirmation dialog, click **Yes**.

Result Users will not see the view removed until they log out and log in again.

Work with conditions

What is a condition?

Conditions form the part of a search, through a view or filter, that controls which results are returned in a view. A condition is analogous to a true-or-false question.

If the answer to the question is true, the result is included in the view. If the result is false, the result does not appear in the view. Conditions are applied one at a time to each result to determine whether the result appears.

When you create conditions at the view level, the condition applies to the view as well as all public and private filters associated with the view. When you create conditions at the filter level, the conditions of the filter and the view apply to the search results. For related views, you can only create conditions at the view level.

What is a variable?

A variable is an element you can use to conditionally style a report or to conditionally render a report.

Each variable contains a set of values that completes the condition. A condition is a combination of a variable and its possible values. By combining custom properties with the Variable type of condition, you can define views or filters that return results keyed exclusively to the user name of the person who is running the view, to some attribute of that user (such as the user's location or organizational unit), or to the date on which the user runs the view.

Types of conditions

View condition types can be Normal, LearnMode, Prompted, Variable, and Relationship. This topic explains when to use each type.

Normal

Most conditions use the Normal type because they do not require the special settings described below. Unless your view requires one of these, use the Normal condition type.

LearnMode

If you want the view or filter to search for matches between a document or record key value and a dictionary field within an application plan, use the LearnMode condition type. Before running a view containing a LearnMode condition, the user must open the corresponding application plan. You cannot create LearnMode conditions for a related view.

Prompted

If you want the user to enter or select a value (as part of a condition) before running the view or filter, use the Prompted condition type. You can prompt for multiple values by adding multiple prompted conditions.

Variable

If you want a document, folder, or record to be included in a view or filter based on the following values, use the Variable condition type.

- The user name of the person running the view
- A user attribute (for example, last name, locality, organization unit)
- The date of the run

Relationship

If you want a related view to search for the following values, use the Relationship condition type.

- Folder property, document, or record key values
- Custom property values that match the specified document or record key
- Custom property value when viewing a document, folder, or record

Grouping and ordering evaluation of conditions

When you group and reorder multiple search conditions for a view or filter, you determine the method in which the search conditions are evaluated to return the results you want.

Evaluation order of conditions

When building a multiple-condition view or filter, it is important to understand the order in which Perceptive Content evaluates (or applies) the individual conditions. If all of your conditions are connected by AND operators, you can leave them ungrouped, as in Example 1.

Example 1

In this example, all the search conditions are connected by AND operators. For this reason, you can leave the conditions ungrouped. The search expression contains the following three conditions:

```
Drawer is equal to Accounts Receivable

AND Field1 is not equal to Region Two

AND Field4 is greater than 2010
```

In the above example, for an item to be returned by the search, all three conditions must be true. No grouping is necessary because `[A AND (B AND C)]` is equivalent to `[(A AND B) AND C]`. If any condition evaluates to false, the item does not appear in the results grid.

Example 2

In this example, you include an OR operator in the conditions. For this reason, you must group them to ensure uniform order of evaluation. The search expression below shows one effect of grouping conditions.

Ungrouped	Grouped
Drawer is equal to Accounts Receivable OR Field1 is equal to Region 2 AND Submit Date is greater than 2010	[(Drawer is equal to Accounts Receivable OR Field1 is equal to Region 2) AND Submit Date is greater than 2010]

In the above example, grouping the first two conditions ensures that `(Drawer is equal to Accounts Receivable OR Field1 is not equal to Region Two)` is evaluated first. If this grouped condition evaluates to false, the remaining AND condition is ignored, and the item does not appear in the search results grid. However, if the grouped condition evaluates to true, then the third condition must also evaluate to true for the item to appear in the search results grid.

Example 3

In this example, you include an OR operator in the conditions and group the second and third conditions with an AND operator. The search expression below shows one effect of grouping conditions.

Ungrouped	Grouped

`Drawer is equal to Accounts Receivable`
`OR Field1 is equal to Region 2`
`AND Submit Date is greater than 2010`
	`(Drawer is equal to Accounts Receivable OR (Field1 it equal to Region 2 AND Submit Date is greater than 2010))`

In the above example, grouping ensures that the grouped second and third conditions `(Field1 is equal to Region 2 AND Submit Date is greater than 2010)` are evaluated first. The ungrouped first conditions is evaluated one of two ways:

- If the grouped conditions evaluate to true, the condition is satisfied, the condition `(Drawer is equal to Accounts Receivable)` is ignored, and the item appears in the search results grid.
- If the grouped conditions evaluate to false, the condition `(Drawer is equal to Accounts Receivable)` is evaluated. If this condition evaluates to true, the item appears in the search results grid. If the condition evaluates to false, the item does not appear.

Grouping three or more conditions

You can group three or more conditions by creating one group using two conditions and then grouping it with a condition above or below the grouped row. The adjacent row can be a single condition, or it can be a group. The following examples show different ways of grouping three conditions. The condition rows are numbered in the examples for quick reference. Row numbers do not appear in the Search tab.

Example 1: Grouping rows 1 and 2 first

Before grouping, the conditions of search expression are:

```
1 Drawer is equal to Accounts Receivable
```

```
2 OR Field1 is equal to Region 2

3 AND Submit Date is greater than 2010
```

First, you group rows 1 and 2, and then click AND in the grouped row to change it to OR. The search expression becomes:

```
1 Drawer is equal to Accounts Receivable OR Field1 is equal to Region
2)

1) AND Submit Date is greater than 2010
```

Then, you group rows 1 and 2 again. The search expression becomes:

```
1 ((Drawer is equal to Accounts Receivable OR Field1 is equal to
Region 2) AND Submit Date is greater than 2010)
```

Example 2: Grouping rows 2 and 3 first

Before grouping, the conditions of the search expression are:

```
1 Drawer is equal to Accounts Receivable

2 OR Field1 is equal to Region 2

3 AND Submit Date is greater than 2010
```

First, you group rows 2 and 3. The search expression becomes:

```
1 Drawer is equal to Accounts Receivable 2 OR (Field1 is equal to
Region 2 AND Submit Date is greater than 2010)
```

Then, you group rows 1 and 2, then click the first AND in the grouped row to change it to OR. The search expression becomes:

```
(Drawer is equal to Accounts Receivable OR (Field1 is equal to Region
2 AND Submit Date is greater than 2010))
```

Create a condition

To add a condition to a view or public filter in View Designer, perform the following steps.

1. In **View Designer**, on the **View** or **Filter** tab, click the ✚ button.
2. In the **Add Condition** dialog box, in the **Constrain By** list, select the constraint to use.
3. In the **Type** list, select the type of search to perform.
4. In the **Field** list, select the field to use in the search.
5. In the **Operator** list, select the operator to use when comparing the field and the value.
6. If you are performing a **LearnMode** search in **Perceptive Content**, in the **Plan** list, select an application plan.
7. In the **Value** box, select or type a value for the search.

If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Enter instructions indicating what value to enter.

8. Click **OK**.

Modify a condition

To modify a condition for a view, public filter, or advanced search, complete the following steps.

1. Perform one of the following actions, depending on the situation.

Situation	Steps
Modify a condition in **View Designer**	• In **View Designer**, click the **View** or **Filter** tab.
Modify a condition in a Perceptive Content search	• In **ImageNowExplorer**, click the **Search** tab.

2. Click the text of the condition you want to modify.
3. In the **Add Condition** dialog box, change one or more selections or values.
4. Click **OK**.

Delete a condition

To remove a condition from a view or public filter in View Designer or ImageNowExplorer perform the following steps.

1. Complete one of the following actions, depending on the situation.

Situation	Steps
To delete a condition in **View Designer**	• Click the **View** or **Filter** tab.
To delete condition in **ImageNowExplorer**	• Click the **Search** tab.

2. On the selected tab, point to the condition you want to select so that a blue arrow appears in the pane to the left of the condition or conditions.
3. In the pane to the left of the condition, click the blue arrow.
4. In the **Conditions** toolbar, click the **Delete** button.

Reorder a condition

You can evaluate a condition in a view, public filter, or advanced search in a different order. You can only reorder one condition at a time. To reorder a condition, complete the following steps.

1. Do one of the following actions, depending on the situation:

Situation	Steps
Modify a condition in **View Designer**	• In **View Designer**, click the **View** or **Filter** tab.
Modify a condition in a Perceptive Content search	• In **ImageNowExplorer**, click the **Search** tab.

2. On the selected tab, position your mouse cursor over the conditions you want to select so that a blue arrow appears in the pane to the left of the conditions.
3. In the pane to the left of the condition, click the blue arrow.
4. In the conditions toolbar, click the **Move Up** or **Move Down** button until the condition reaches the position you want.

Group two conditions

You can group two conditions in a view, filter, or advanced search. To group two conditions, complete the following steps.

1. Complete one of the following actions, depending on the situation.

Situation	Steps
Group conditions in a view or filter in **View Designer**	• In **View Designer**, click the **View** or **Filter** tab.
Group conditions in an advanced search in **Perceptive Content**	• In **ImageNowExplorer**, click the **Search** tab.

2. To select the two conditions you want to group, point to the first condition you want to select so that a blue arrow appears in the pane to the left of the condition.
3. In the pane to the left of the condition, click the blue arrow.
4. Hold down the `CTRL` key, and then repeat the previous steps to select the second condition.
5. In the toolbar, click the **Group** button.
6. Optional. Click the operator to change it from **AND** to **OR**.

Ungroup conditions

You can remove a grouping between two or more conditions to change the way they are evaluated. To ungroup conditions, complete the following steps.

1. Complete one of the following actions, depending on the situation.

Situation	Steps
Modify a condition in **View Designer**	• In **View Designer**, click the **View** or **Filter** tab.
Modify a condition in an Perceptive Content search	• In **ImageNowExplorer**, click the **Search** tab.

2. On the selected tab, point to the grouped conditions you want to select so that a blue arrow appears in the pane to the left of the conditions.
3. In the pane to the left of the grouped conditions, click the blue arrow.
4. In the conditions toolbar, click the **Ungroup** button.

Create a document or folder relationship condition

To add a relationship condition to a related item or related view, complete the following steps.

1. In **View Designer**, on the **View** tab, click .
2. In the **Add Condition** dialog box, complete the following actions:

Situation	Steps
Constrain by list	• To search for values that match a custom property associated with the document or folder type, select **Custom Property**. • To search for values that match a folder's name or type in a related folder view, select **Folder property**. • To search for values that match a document key in a related document view, select **Document key**.
Type list	• Select **Relationship**.
Field list	• Select the field that contains the value you want to match against other document or folder properties.
Operator list	• Select the operation to use when comparing the field and the value.
Value list	• Select or enter the value that contains the value to match against the property in the **Field** list.

Example To see all documents with a *Field3* value that matches the **Check Number** custom property in the active document, the condition reads as follows:`Check number is equal to <<Context: Field3>>`

3. Click **OK**.
4. In the **Designer** toolbar, click the **Save** button.

Use filters

What is a filter?

A filter is an optional component of a view that serves as a saved search which narrows the view results.

In a filter, you add conditions that Perceptive Content evaluates in addition to the view conditions. You can also modify the column layout separately from the view. When you click a filter, the results always appear automatically. You can create a prompted or variable filter condition.

Views can include public and private filters. When you create a filter in View Designer, that filter becomes available to all users with access to the corresponding view. It is called a public filter. When a user creates and saves a filter, it is available only to that user and is called a private filter. View managers can publish a private filter, which then becomes a public filter available to all users with access to the corresponding view.

Filters and views

Although there are no absolute criteria to determine when you should create a new view as opposed to a filter in an existing view, the following guidelines will help in your planning.

When	Create
Conditions in existing views exclude results you need to display	A new view
The results of that view should be limited to different groups of users	A new view
The view alone would return more results than the user wants to see all at once	A new filter

Create a public filter

You can create a public filter for a view. To complete a public filter, perform the following steps.

You cannot perform this procedure for a related view.

1. In **View Designer**, on the **Filters** tab, click the **New Filter** button.

2. In the **New Public Filter** dialog box, type a name, add a description that will appear as the ToolTip for the filter, and then click **OK**.
3. Optional. Add conditions to the filter.

   The original view conditions appear, dimmed and unavailable, at the top of the conditions area. The filter you create builds upon these conditions.
4. Optional. Modify the column layout for the filter.
5. Click the **Save** button.

Hide a public filter

You can hide a public filter from the Views pane for an item by making it inactive. To hide a public filter, perform the following steps.

1. In **View Designer**, on the **Filters** tab, expand **Public Filters**.
2. Select the filter and then click **Properties**.
3. In the **Modify Filter** dialog box, clear the **Is active** check box.
4. Click **OK**.

Copy a public filter

You can copy a public filter from a different view and all its conditions and layout components. To copy a public filter, perform the following steps.

1. In **View Designer**, on the **Filter** tab, click the **Copy Filter From** button.
2. In the **Copy Filter From** dialog box, in the **View** list, select the view that contains the filter you want to copy, select the filter in the list below, and then click **OK**.
3. Optional. To rename the copied view, do the following substeps:
   1. Expand **Public Filters**, select the filter, and click the **Properties** button.
   2. In the **Modify Filter** dialog box, enter a new name and optional description and then click OK.
4. In the **Designer** toolbar, click the **Save** button.

Rename a filter

You can rename a public or private filter for a view. To rename a filter, complete the following steps.

1. In **View Designer**, on the **Filter** tab, expand **Public Filters** or **Private Filters**, select the filter.

   Note:
   To view records functionality, you must install a Records Manager license
2. Click the **Properties** button.
3. In the **Modify Filter** dialog box, in the **Name** box, type the new name.
4. Click **OK** and save the view.

Delete a filter

To delete a public or private filter from a view, perform the following steps.

1. In **View Designer**, on the **Filter** tab, select the public or private filter you want to delete and then click the **Delete** button.
2. In the confirmation dialog box, click **Yes**.

Publish a private filter

You can publish a private filter to make it a public filter that is visible to all users who can access the view. To publish a private filter, complete the following steps.

1. In **View Designer**, on the **Filter** tab, under **Private Filters** expand the user name of the user who created the private filter.
2. Select the filter you want to publish and click **Publish**.
3. In the confirmation dialog box, click **Yes**.

Result The filter moves to the Public Filters list.

Customize a view layout

What is a column layout?

A column layout defines column order, sorting, and appearance for a view or filter.

When defining column layout, you can reorder, rename, hide, and show columns within the results grid. You can also add one or more custom property columns and group or sort the search results in the column layout.

Pre-formatting the display of columns is an important advantage of views. This feature saves the user the time and effort required by manually adjusting columns each time the user opens a view or to create private filters.

Rename a column

To rename a property column in a view or filter, complete the following steps.

1. Click the **Columns** button.
2. In the **Columns** dialog box, select one of the following columns:
   - Drawer
   - Field1
   - Field2
   - Field3
   - Field4
   - Field5
   - Type

3. Click **Edit** in the **Label** column, type the new name, and press ENTER.
4. Repeat the previous steps to rename additional columns and click **OK**.
5. Save the view or filter to preserve the column names.

Reorder a column

To determine the order of the columns in the search results grid for a view, public filter, private filter, or search results grid, complete the following steps.

1. Do one of the following actions, depending on the situation:
   - In **View Designer**, in the **Preview** pane, click the **Columns** button.
   - In **ImageNowExplorer**, in the **Explorer** toolbar, click the **Columns** button.
2. In the **Columns** dialog box, do the following substeps:
   1. Select the column you want to reorder and then click **Move Up** or **Move Down**.
   2. Repeat the previous step for any other columns you want to rearrange.
   3. Click **OK**.
3. In the **Designer** toolbar, click the **Save** button or save the search results as a private filter.

Select columns to display

To show or hide columns in a view or public filter, complete the following steps.

1. In **View Designer**, in the **Preview** pane, click the **Columns** button.
2. In the **Columns** dialog box, do the following substeps:
   1. For the column or columns you want to hide, clear the check box. To hide all columns, right-click anywhere in the dialog box and then click **Clear All**.
   2. For the column or columns you want to show, select the check box. To show all columns, right-click anywhere inside the dialog box and then click **Select All**.
   3. Click **OK**.
3. In the **Designer** toolbar, click the **Save** button.

Add a custom property column

To add columns to display custom property values for content, complete the following steps.

1. Access the view using one of the following methods:

Situation	Steps
Add a custom property column for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. In **Workflow Designer**, open the desired queue.

Situation	Steps
	3. In the **Queue Properties** dialog box, click **Appearance**. 4. In the right pane, click **Preview**.
Add a custom property column for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Add a custom property column for a folder content view	1. In **Management Console**, in the left pane, click **Folder Types**. 2. In the right pane, on the **Folder Types** tab, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click **Preview**.

2. In the **View Preview** window, click the **Columns** button.
3. In the **Columns** dialog box, click **Add**.
4. In the **Custom Property** dialog box, select the **Filter by** list and do one of the following actions:
   - To display a custom property based on item type, select **Document Types**.
   - To display a custom property based on folder type, select **Folder Types**.
   - To display all custom properties, select **All Custom Properties**.
5. In the **Type** list, select a custom property.
   The **Type** list options change based on the **Filter by** option selected.
6. Select a custom property and click **Add**.
7. Click **OK**.

Sort view or search results

You can sort the rows in the results grid for a view or public filter. To sort view results, complete the following steps.

1. In the view preview or search results grid, to sort by a single column, right-click the column heading and then do one of the following:
   - To sort the results in ascending order, select **Sort Ascending**.
   - To sort the results in descending order, select **Sort Descending**.
2. To sort by additional columns, hold the `SHIFT` key and click the column heading once to sort the results in ascending order or twice to sort the results in descending order.

Note: To sort on multiple columns, you must group the results.

3. Optional. To remove all sorting, right-click a column heading and select **Reset sort order**.
4. Save the view or filter to preserve the sort order.

Group view or search results

You can group the results of a view, filter, or search by one or more columns into groups you can expand and collapse. To group view results, complete the following steps.

1. In the search results grid or view preview grid, right-click a column heading, and then click **Group by this Column**.

   Groups are initially collapsed when the view or filter runs.
2. Optional. To create a subgroup under the grouped column, right-click a column heading, and then click **Group by this Column**.
3. Optional. To expand the grouped results, right-click a column headings, and then click **Expand All Groups**.
4. Save the view or filter to preserve the column grouping.

Ungroup view or search results

To remove grouped results of a view, filter, or search, complete the following steps.

1. In the view preview or search results grid, right-click a column heading and select **Show Group Area**.
2. Right-click the grouped column heading you want to ungroup, and then select **Remove Column Grouping**.
3. Repeat the previous step for all grouped columns you want to ungroup.
4. Save the view or filter to preserve ungrouped results.

Preview

What is a preview variable?

A preview variable simulates the results of a view or filter depending on your Perceptive Content environment.

When you run the view or filter without a preview variable, the search results that appear are based on your user name and the current date. However, if the search conditions include the current user or current date variables and you insert preview variables with a different user name or date or both, you can inspect the results as they would appear when viewed by that user, or on the specified date, or both.

Keep in mind that when you run a preview with a user variable, the results appear based on your drawer security. Because the user specified in the preview variable might have access to more drawers or fewer drawers than you, the preview may return more or fewer results for you than it does for the user.

> For example, you can include a variable condition in a view or filter that tests for a user name. You might define a custom property field called Employee as a User data type. The name in the Value field will be different for each person who runs the view or filter. When you supply a user name as a preview variable, the results for the specified user appear.

Add a preview variable

You can add a variable that lets you preview the view or filter results as another user or using a different date. You cannot perform this procedure for a related view. To add a preview variable, perform the following steps.

1. In **View Designer**, in the **Preview** pane, click the **Preview Variable** button.
2. In the **Preview Variables** dialog box, do one or both of the following options:
   - To substitute a different date for the current date, under **Date and Time**, click the second button and then enter the date you want.
   - To substitute a different user name for your own user name, under **User**, click the second button and then enter the user name you want.
3. Click **OK**.

Highlight preview results

You can find items within the view or filter preview grid that match specified text. Items that match the specified text appear highlighted in the grid. To highlight preview results, complete the following steps.

You cannot perform this procedure for a related view.

1. In **View Designer**, in the **Preview** pane, click the **Find** button.
2. In the **Find** bar, enter the text you want to find from the items currently in the grid.

   The matching items are selected.
3. Optional. To select the next item that matches your search criteria, click the **Next** button or to select the previous item that matches your search criteria, click the **Previous** button.
4. When you are finished, close the **Find** bar.

Work with statistics

What are statistics?

Statistics are calculations such as the maximum, minimum, and average of all the values in a specific column that appear in the search results for the view.

You can define statistics for any document view, folder view, task view, record view, or record folder view for which you have management privileges. You cannot define statistics for a public filter or a related view.

For any folder type for which you have management privileges, you can create a view that determines the appearance of the folder content results in Folder Viewer. You can also create a statistic for a workflow view, which defines the appearance when viewing the contents of a workflow queue. When you define a set of statistics for a folder content or workflow view, the statistics appear in a pane below the search results grid. In the statistics pane, you can view the statistics, highlight the search results in the grid that apply to the statistic, and, if only one document or folder matches the statistic value, open the document or folder.

The following examples demonstrate some ways you can use view statistics.

Accounts Payable: Theresa is an Accounts Payable administrator who wants to quickly view the total of all the invoices in her "OpenInvoices" view. This view contains a custom property column which stores the invoice amount for each document. Because it is a numeric custom property, Theresa adds a Sum statistic on this custom property column named "Total open amount". Every time she runs a search using this view, she sees the total invoice amount of all the documents returned by the search in the statistics pane.

Admissions: Sam is an Admissions director who wants to view the average ACT score of the students who applied to his university in the current academic year. His student folder view contains a custom property column which stores the ACT score for each student and a date range that spans the current academic year. Because the view uses a numeric custom property, Sam adds an Average statistic on this custom property column named "Average ACT."

Healthcare: Dr. Lovelace wants to quickly view the next task he is responsible for in his folder view that lists all his patients with document deficiencies. His view administrator adds a Next statistic to the task due date column in the view. When Dr. Lovelace logs in, he can quickly see the date the next task is due, highlight the document associated with the task, and open it in ImageNowViewer.

To view records functionality, you must install a Records Manager license.

Add view statistics overview

The configuration of a view statistic differs based on the data value type you select. You can create statistics for document, folder, folder content, record, task, and workflow views. To create a statistic for a view, complete any of the following procedures.

- /1.
- /1.
- /1.
- /1.
- /1.

Modify a statistic

To modify the components of a statistic defined for a view, complete the following steps.

1. Access the view preview using one of the following methods.

Situation	Steps
Create a date statistic for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Create a date statistic for a container content view	1. In **Management Console**, in the left pane, select **Folder Types**.

Situation	Steps
	2. In the right pane, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click the **Preview** button.
Create a date statistic for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. Double-click the queue to open the **Queue Properties** window. 3. In the **Queue Properties** window, in the left pane, select **Appearance**. 4. In the right pane, click **Preview**.
Create a date statistic for a workflow process view	1. Open the workflow process in **Workflow Designer**. 2. Click **File > Properties**. 3. In the **Process Properties** dialog box, under **Appearance**, click **Preview**.

2. In the **Preview** pane, click the **Statistics** button and then, in the **Statistics** dialog box, click the row of the statistic you want to change.
3. Do one of the following actions.
   - To change the statistic definition, highlight the statistic row and then modify the components you want to change.
   - To reposition the statistic, click **Move Up** to move it ahead of the preceding statistic, or click **Move Down** to move it after the following statistic.
4. Click **OK**.
5. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Remove a statistic

To remove a statistic from a view, complete the following steps.

1. Access the view preview using one of the following methods.

Situation	Steps
Create a date statistic for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.

Situation	Steps
Create a date statistic for a container content view	1. In **Management Console**, in the left pane, select **Folder Types**. 2. In the right pane, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click the **Preview** button.
Create a date statistic for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. Double-click the queue to open the **Queue Properties** window. 3. In the **Queue Properties** window, in the left pane, select **Appearance**. 4. In the right pane, click **Preview**.
Create a date statistic for a workflow process view	1. Open the workflow process in **Workflow Designer**. 2. Click **File > Properties**. 3. In the **Process Properties** dialog box, under **Appearance**, click **Preview**.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click the row of the statistic you want to remove and click **Remove**.
4. Click **Yes** in the confirmation prompt and then, in the **Statistics** dialog box, click **OK**.

Result Removing a statistic does not remove the column from the view.

Data types for statistical functions

The statistical functions you can define depend on the data type of the column values. To add a statistic for a custom property column, you must first add the custom property column to the view. The following statistics are available for the specified data types.

Statistical functions

Average

This function calculates the average of the column values.

Column value data type

Numeric

Sample columns

Summary Task Count

<Number custom property>

Count

This function counts the number of values in the search results grid that match the selected variable (you must select a variable for this statistical function).

Column value data type

String, list, flag

Sample columns

Folder Name

In Workflow

<List custom property>

<String custom property>

<Flag custom property>

Count Future

This function counts the number of the column's date values that occur in the future.

Column value data type

Date

Sample columns

Next Task Due

Due Date

<Date custom property>

Count Past

This function counts the number of the column's date values that occur in the past.

Column value data type

Date

Sample columns

Created

Last Viewed

<Date custom property>

First

This function distinguishes the earliest date in the column's search results.

Column value data type

Date

Sample columns

Modified

Checked Out

<Date custom property>

Last

This function distinguishes the latest date in the column's search results.

Column value data type

Date

Sample columns

Checked In

Assigned

<Date custom property>

Maximum

This function distinguishes the largest numeric value in the column's search results.

Column value data type

Numeric

Sample columns

Pages

<Number custom property>

Median

The function distinguishes the middle value in the column's search results.

Column value data type

Sample columns

Current Version

<Number custom property>

Minimum

This function distinguishes the smallest numeric value in the column's search results.

Column value data type

Numeric

Sample columns

Days Until Due

<Number custom property>

Mode

This function distinguishes the most frequently occurring numeric value in the column's search results.

Column value data type

Numeric

Sample columns

Summary Task Count

<Number custom property>

Next

This function distinguishes the next sequential date value in the column's search results.

Column value data type

Date

Sample columns

Status Changed

<Date custom property>

Previous

This function distinguishes the previous sequential date value in the column's search results.

Column value data type

Date

Sample columns

Completed

<Date custom property>

Sum

This function calculates the total of the values in the column's search results.

Column value data type

Numeric

Sample columns

Pages

<Number custom property>

Secure views

Grant access to a view

To grant a user or group access to a view, perform the following steps.

1. In **View Designer**, on the **View** toolbar, click the **Properties** button.
2. In the **View Properties** dialog box, on the **Security** tab, click **Add**.
3. In the **Select Users and Groups** dialog box, select the users or groups you want to add and click **OK**.
4. Under **Users and Groups**, select the user or group.
5. Under **Privileges**, grant a privilege by clicking in the column to the left of the privilege until the **Granted** icon appears, or deny a privilege by clicking in the same position until the **Denied** icon appears.
6. Repeat these steps for each user or group you added and then click **OK**.

Deny access to a view

To deny a user or group access to a view, please perform the following steps.

1. In **View Designer**, on the **View** toolbar, click the **Properties** button.
2. In the **View Properties** dialog box, on the **Security** tab, in the **Users and Groups** list, select the user or group that should not have access to the view and click **Remove**.
3. Click **OK**.