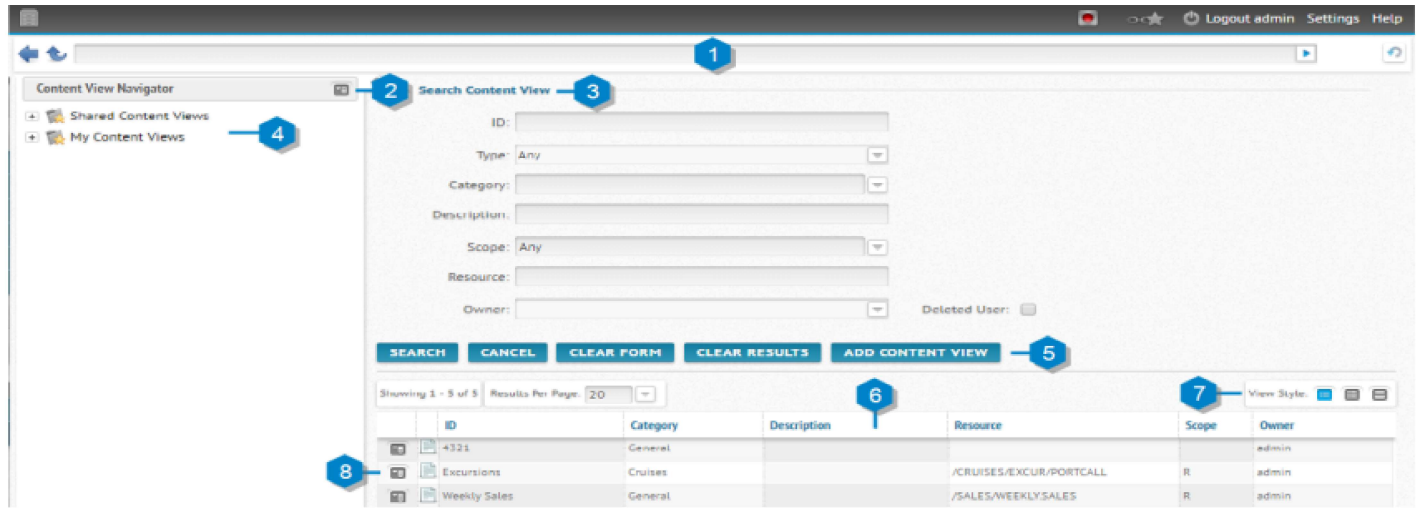# Content View User Interface

Open the Content View window to access your content view templates, click **Tools > Content View**.



| Item | | Description |
|---|---|---|
| **1** | Address Bar | Enables you to enter a resource path to a specific content view. |
| **2** | Content View Navigator Action menu | Click the Action menu to view the following options:<br>• **Search Content View** — Opens the Search Content View panel.<br>• **Reload** — Reloads the navigation tree. |
| **3** | Content View Search Fields | • **ID -** The ID of a content view. You can enter part or the full ID.<br>• **Type -** You can refine the search based on the type of tool used to create the content view. Select either Any, or CI from the drop-down list.<br>• **Category -** The category to which the content view belongs. Select a category from the drop-down list.<br>• **Description -** The description associated with a content view. You can enter either a part or the full description.<br>• **Scope -** You can refine the scope of your search by selecting either Any, Directory, or Document from the drop-down list.<br>• **Resource -** The root folder to which the content view belongs. You can enter a part or all of the folder name. You cannot search by subfolder name.<br>• **Owner -** The user to which the specific content view belongs. Select a user from the drop-down list.<br>• **Deleted User -** Select this box to search for a content view created by a user that is deleted. |
| **4** | Content View Navigator | The navigation tree shows two root folders:<br>• **Shared Content Views** — Displays any categories and views that you have shared, as well as any categories and views that have been shared with you.<br>• **My Content Views** — Displays any categories and views that you have created. |
| **5** | Action Buttons | • **Search -** Runs the search based on the information entered into the fields.<br>• **Cancel -** Cancels the search.<br>• **Clear Form -** Clears the search fields.<br>• **Clear Results -** Clears the results pane.<br>• **Add Content View -** Enables you to create a new content view. |
| **6** | Search Results Panel | Displays content based on the search fields entered. |
| **7** | View Style | Select one of the view styles to display search results: Tight, Comfy, or Spacious. |
| **8** | Content Action Menu | Use the Action menu to display the available actions for the content view window:<br>• Edit Content View<br>• Copy Content View<br>• Delete Content View<br>• List Content View Versions (Lists all the versions for this content view)<br>• Change Template Owner (Allows you to select a new template owner) |

▼ View Editor



| | Field | Description |
|---|---|---|
| 1 | Original Document | This upper pane displays the original document's content. This is where you can highlight information that you want to view. |
| 2 | Preview | The preview panel shows what will be seen from the original document when using the Content View template. The preview will display whatever is highlighted in the upper panel with the original document. |
| 3 | View Editor options | • **Properties -** Define the description, category, resource type and name in the Properties dialog. See View Properties below for more details.<br>• **Download as CSV -** Downloads the content view template as a CSV file.<br>• **Save -** Saves this template.<br>• **Close -** Closes this template. |
| 4 | Page | Click the up or down arrow to page through the document. |
| 5 | Sections | You must have at least one section to create a content view template. Click Add Section to create one or more sections. You can define the section by clicking and dragging in the original document pane, or you can adjust the range by line number in the Section panel. |
| 6 | Header | Click this check box to indicate the selected section is the header of your document. |
| 7 | Add Column | Click to add a column within this section. You can have as many columns as needed. Adjust the range by clicking and dragging in the original document panel, or increase and decrease the number of columns using the toggle boxes. |
| 8 | Force CSV Text | If exporting this document as a CSV file, you can select this check box to place commas between columns in the exported file. |
| 9 | Duplicate Section | Click to create another section based on the highlighted one. |

▼ View Properties

| | Field | Description |
|---|---|---|
| 1 | Description | Type a description for this content view template. |
| 2 | Category | Select the category this template should be assigned to from the drop-down list. |
| 3 | For Resource Type | Select the resource for this template. Selecting directory or document will provide you with a Resource Name field that must be completed in order to apply the resource to the template. |
| 4 | Resource Name | Type the path for the resource. |
| 5 | Public | Select this box to allow public access to this Content View. When selected, you will see additional drop-down lists allowing you to select users, groups, and roles that will have access to this Content View template. You must select either a user, group, or role to enable public access. |
| 6 | Sample File | Click the check box on the left to select this file as the primary sample file. Click the X to the right to delete this file from the samples. |
| 7 | Add Sample File | Click the plus icon to add a sample file (see image below). |

To add a sample file, type a description and select the file to add then click Add when finished.