

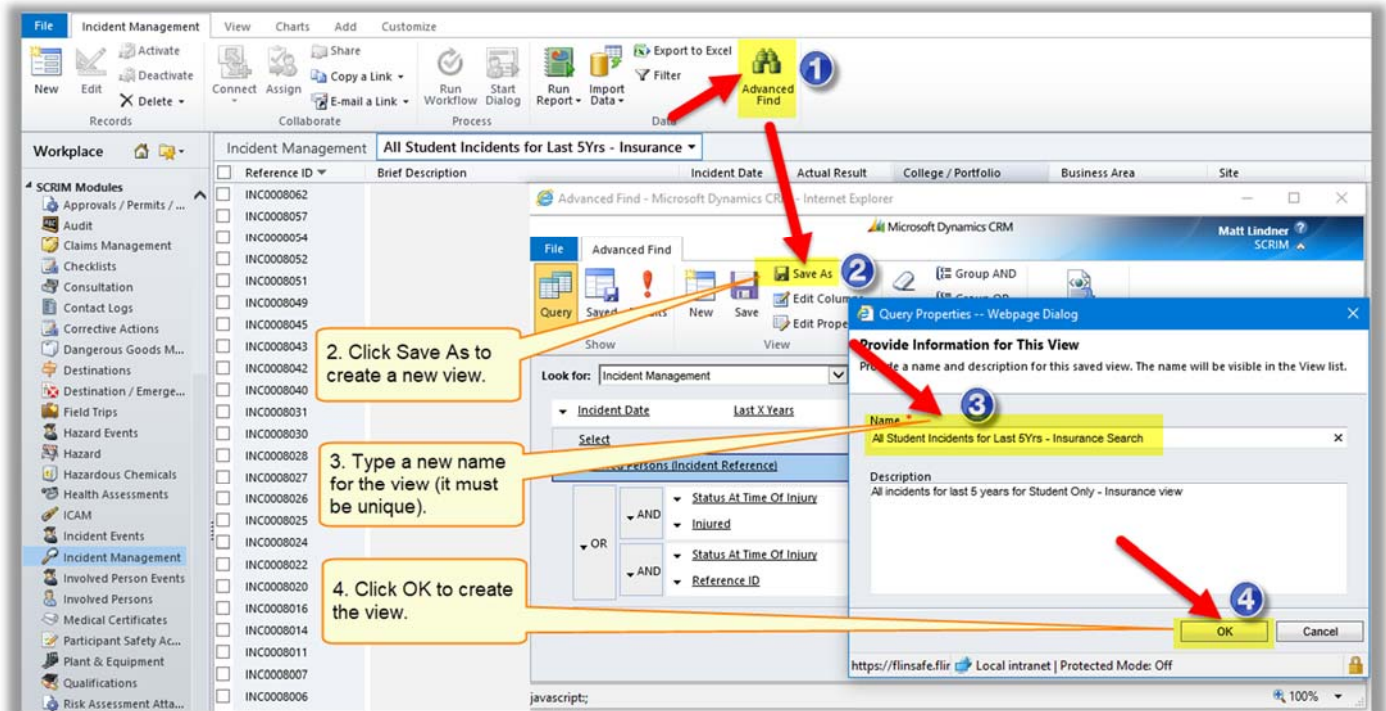
Master Class – Creating and basic editing of a view – Quick Reference

MC3

Open FlinSafe (<https://flinsafe.flinders.edu.au/SCRIM/main.aspx>). The Dashboards View will open. Under the current record type view (i.e. Incident Management), click on **Advanced Find** in the Ribbon Bar (see **Figure 01** below).

- 1 **Advanced Find** – Click on this to open the Advanced Find window.
- 2 **Save As** – Click on this to save the current view as a new name. This will allow you to edit the view and create the filters.
- 3 **View name** – Type the new view name here.
- 4 **Saving** – Click OK to save the new view.

(Figure 01: Creating a new view)



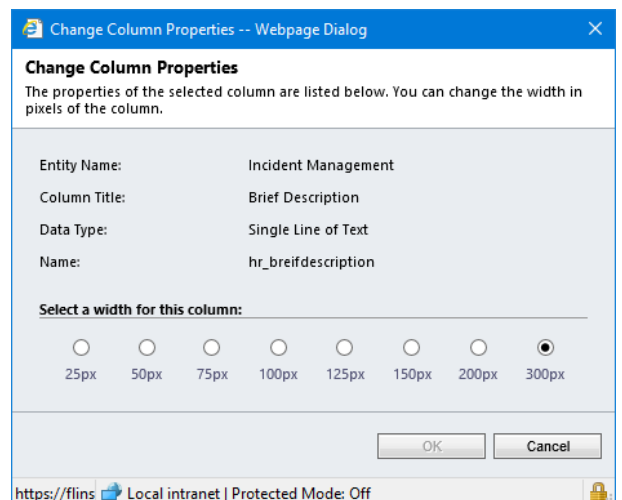
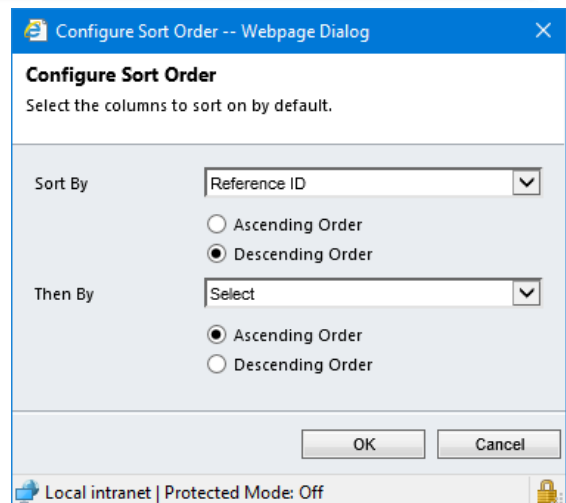
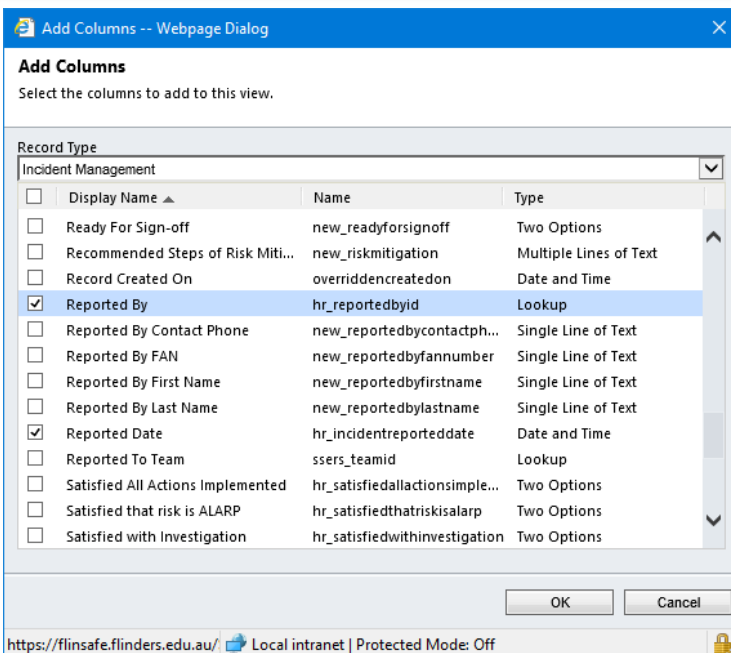
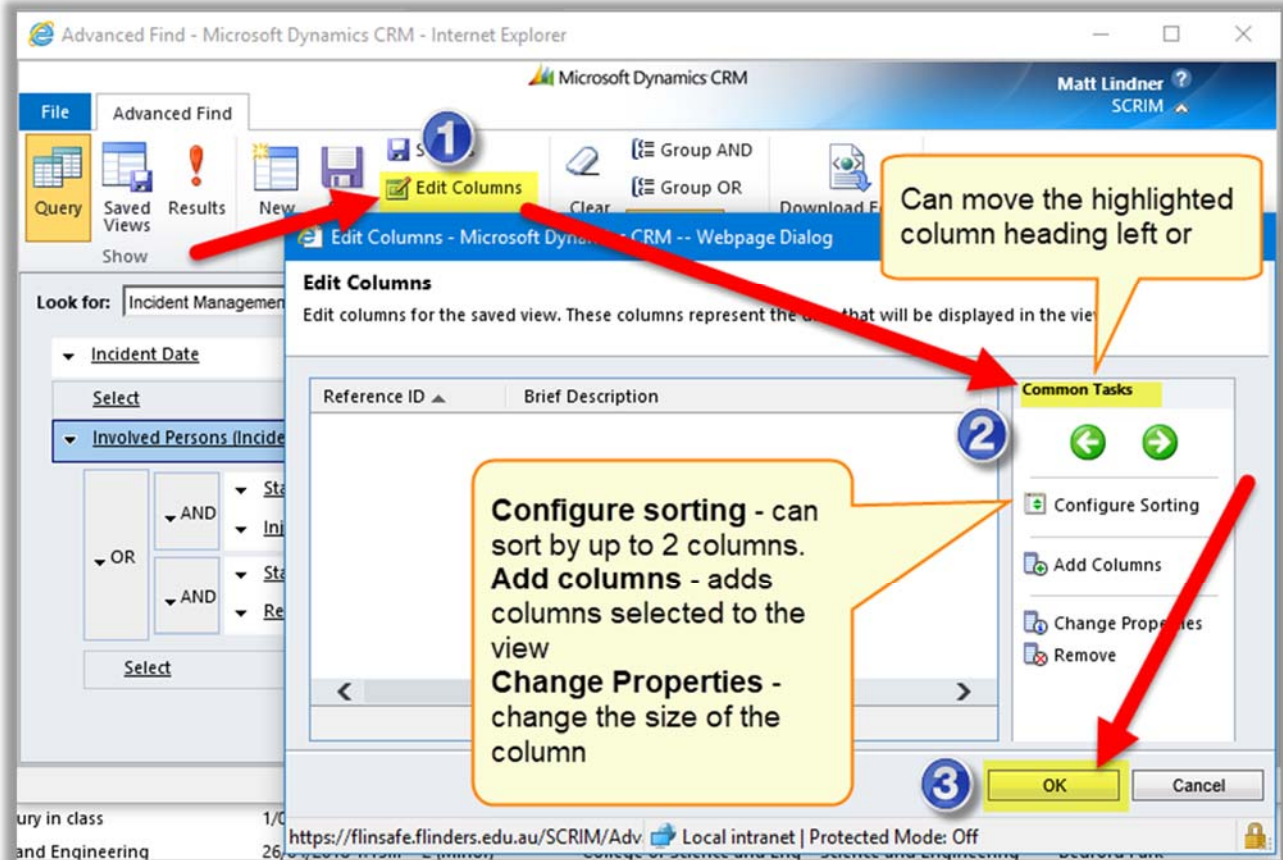
Within the new view (or existing views), the columns can be edited, removed, shifted as desired to produce the desired view.

Note: A view can only be edited if you have permission to do so. The best method is to perform the above and save the view as another name, which then makes it editable.

To customise a view, use the ribbon bar in the Advanced Find window to change the view's name or properties of columns (see **Figure 02** below).

- 1 **Edit Columns** – Click on **Edit Columns** to start editing the order of columns, add new columns or remove columns. Each column has properties to adjust its width and an option to sort by up to two columns.
- 2 **Common Tasks** – Click on **green left** and **right** arrows to move a column heading left or right in the order in the view. Click on a column and click **Change Properties** to edit its width.
- 3 **Saving** – Click **OK** to make the changes. Make sure the **Save** button has been clicked afterwards to ensure the changes are saved

(Figure 02: Editing a view)



Clockwise from above:

Add Columns window for adding new columns to a view (only columns not already in the view are in the list to add).

Configure Sort Order window for sorting up to 2 columns either ascending or descending.

Change Column properties window adjust the column width (useful if the details are not quite visible when checking the view).