

Creating a New Case View

1

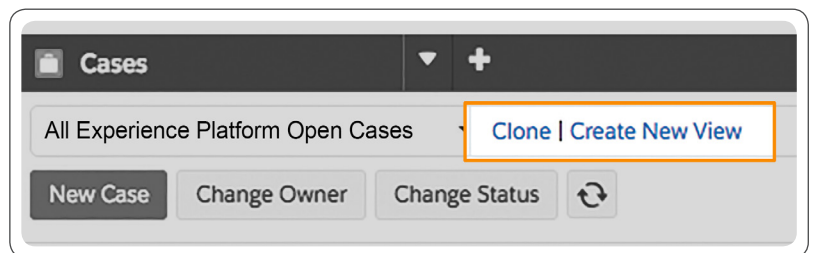
Create a New Case View

2

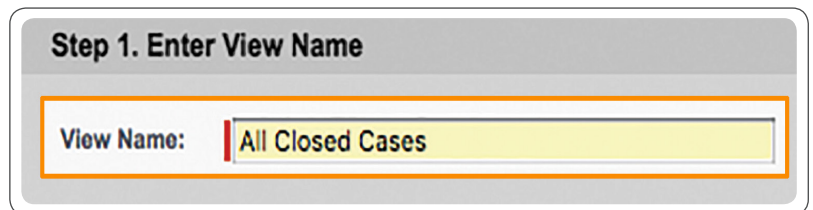
Cloning a New Case View

1.1 Click on **Create New View**

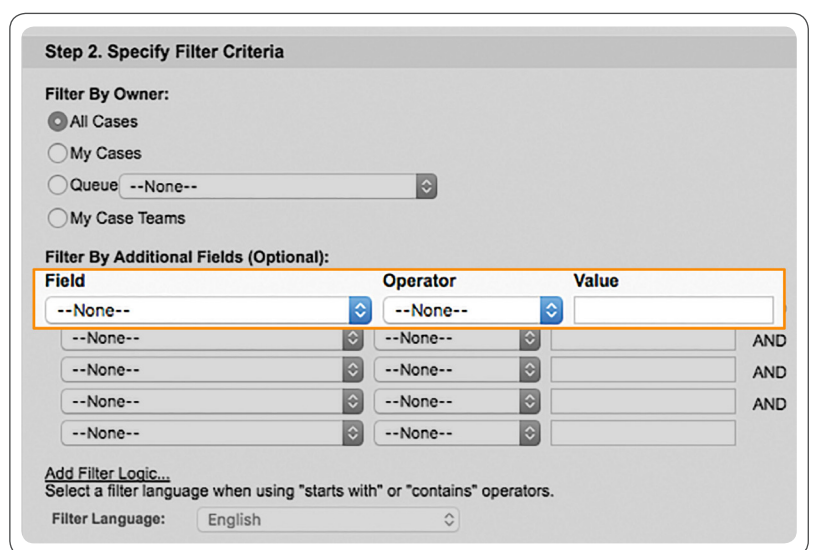
In this example, we will create a new view for **All Closed Cases**.



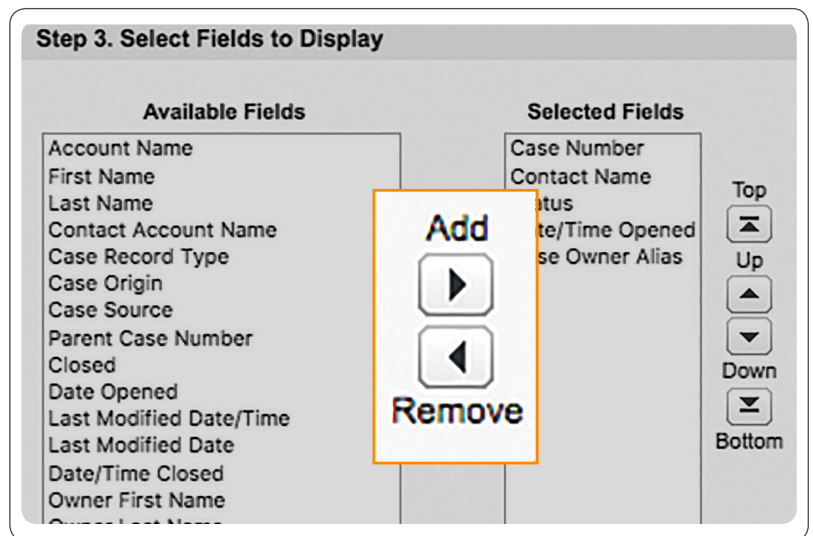
1.2 Enter the name of your view in the **View Name** field.



1.3 Fill out the necessary fields under the **Specify Filter Criteria** section.



- 1.4** Under the **Select Fields to Display** section you can choose to **Add** or **Remove** the fields that you want to display in your new view.



TOP TIP

You can also use the **Up** and **Down** arrows to change the order of how you want the fields to display.

- 1.5** Click **Save**.



You can now view all Closed Cases for your property under the New View - **All Closed Cases**.

- 1.6** You have the option to **Edit** the view - if you needed to make a **change**, **delete** the view or **create**.



1

Create a New Case View

2

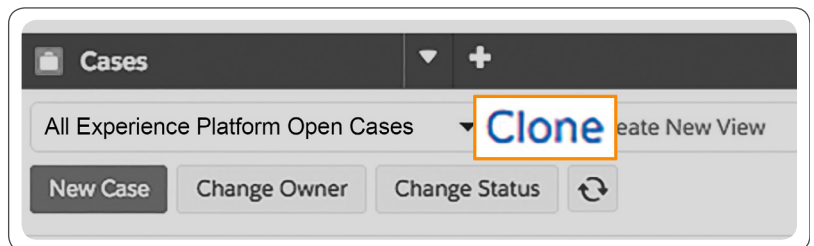
Cloning a New Case View



TOP TIP

You can also choose to Clone an existing view, which allows you to Copy an existing view including its filter options so you don't have to start over when creating a similar view.

2.1 Click **Clone**



2.2 You can now view the existing filter options used to create the **All Guest Experience Platform Cases** View.

Step 1. Enter View Name

View Name:

Created By: Greg Munck, 7/24/2017 11:15 PM Modified By: Malavika Devakonda, 7/31/2017 12:08

Step 2. Specify Filter Criteria

Filter By Owner:

☒ All Cases
 ☐ My Cases
 ☐ Queue:
☐ My Case Teams

Filter By Additional Fields (Optional):

Field	Operator	Value
<input type="text" value="Case Record Type"/>	<input type="text" value="equals"/>	<input type="text" value="Property Cases,Anything"/>
<input type="text" value="Status"/>	<input type="text" value="not equal to"/>	<input type="text" value="Closed,Cancelled"/>

2.3 Update the **View Name**.

View Name:

- 2.4 Update the **Status Field** to equals, **Closed**.

Status

equals

Closed,Cancelled

AND

- 2.5 Click **Save As**.

- 2.6 You can now use your new view to see **All Closed Cases**.

All Closed Cases

View:

All Closed Cases

[Edit](#) | [Create New View](#)

<input type="checkbox"/> Action	Case Number ↑	Response Required	Status	Elapsed tin
<input type="checkbox"/> Edit Del	07856247		Closed	1730:03:44
<input type="checkbox"/> Edit Del	07902865		Closed	1699:01:21

Your task is now complete. Please save this job aid for future reference.



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