

# Create or Edit a Custom View

Home > EMResource > Guide - Preferences > Create or Edit a Custom View



A custom view can be created to display information about specific resources. This view can be accessed through the View menu, or it can be made to open as your default view. You can edit your customized view at any time.

Springfield, USA (DEMO)PreferencesCustomized ViewACTIVE EVENTS (2)

Heat Advisory

Hospital Intoxication Patient Surveillance

Edit Custom ViewSystem NoticePending Forms(4)Help

Hospitals (6)

EMS Providers (7) Edit | Delete | Sort

Riverside Ambulances (3)

Aeromedical (2)

Remove - will be removed from view (0)

Enter New Section Name

Create Section

☐ Make this custom view my default view

Save

Cancel

American Medical Response [EMS Providers]

City EMS [EMS Providers]

Community Ambulance [EMS Providers]

Fort Meyers Fire/Rescue [EMS Providers]

Riverside Medical Center EMS [EMS Providers]

Rural Metro [EMS Providers]

West Metro Health [EMS Providers]

Add More Resources

Sort All

Options...

For tips on working with your custom view, refer to [About Your Custom View](#).

**Note:** You may include resources from neighboring regions in your custom view, but only if a Mutual Aid Agreement has been put in place or you have been granted access to multiple regions.

## To create or edit a custom view

1. In the main menu, click **Preferences** and, in the list, select **Customized View**. The *Edit Custom View* page opens.
2. Take one or more of these actions.

If you want to...	Then...
Add more resources to the custom view,	<div>a. Click <b>Add More Resources</b>. The <i>Find Resources</i> page opens.</div> <div>b. Enter search criteria in one or more fields and click <b>Search</b>. The search results open.</div> <div>c. On the left, select the checkbox for the resources you want to include in the view.</div> <div>d. Click <b>Add to Custom View</b>. The <i>Edit Custom View</i> page re-opens.</div>
To create a new section on the view,	On the lower left, enter the section name and click <b>Create Section</b> .
To move a resource to a new section,	<div>a. In the left pane, select the section where the resource currently resides.</div> <div>b. In the right pane, drag the resource to the left pane and drop it on the appropriate section.</div>
To change the order of sections,	<div>Do one or both of the following:</div> <div>a. Drag the section headers up or down in the left pane.</div> <div>b. Click <b>Sort All</b>.</div>

To change the order of resources within a section,	<p>Do one or both of the following:</p> <ul style="list-style-type: none"> <li>a. Drag and drop the resource to its new location in the list.</li> <li>b. Click <b>Sort</b> in the section header.</li> </ul>
To edit a section name,	<ul style="list-style-type: none"> <li>a. On the left, click the section name. The section is highlighted.</li> <li>b. On that row, click <b>Edit</b>. The name appears in a new field entitled, New name.</li> <li>c. Edit the section name and click <b>Submit</b>.</li> </ul>
To delete a section,	<ul style="list-style-type: none"> <li>a. On the left, click the section name. The section is highlighted.</li> <li>b. On that row, click <b>Delete</b>. The section is removed.</li> </ul>
To change the standard statuses (columns) in your custom view,	<ul style="list-style-type: none"> <li>a. On the lower right, click <b>Options</b>. The <i>Edit Custom View Options (Columns)</i> page opens.</li> <li>b. Select or clear the checkboxes for <i>Standard Statuses</i>.</li> <li>c. If appropriate, in the <i>Options</i> section, select or clear these checkboxes.</li> <li>d. Click <b>Save</b>.</li> </ul>

3. If appropriate, select the **Make this custom view my default view** checkbox.

4. Click **Save**. Your customized view opens.