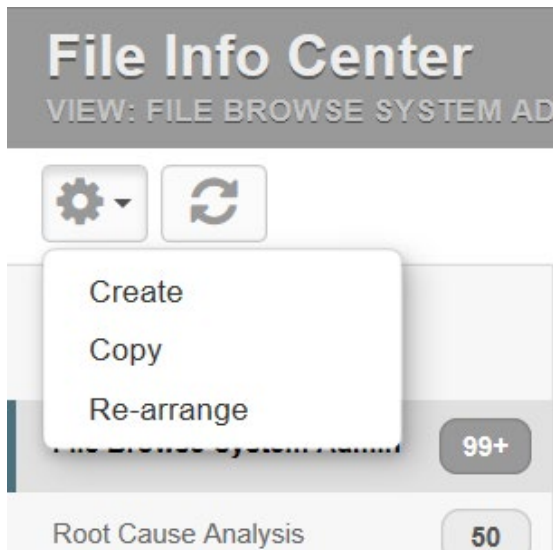




## How to Create “Files to be Signed Off by Me” as a Personal View

Start by going into your **File Info Center** (designated as the clipboard on the top left side of the page of widgets). Go to the **settings icon** on the top left side of the page to create a Personal View and click the down arrow:



Click **Create** and a dialogue box will appear; all 3 tabs (Settings, Filters, Columns) must be completed. Start with tab 1, **Settings** and set up as indicated:

Settings	Filters	Columns	?
Entity(Required)	File		
Module(Required)	Risk		
Caption(Required)	Files to be Signed Off by Me		
Page Size(Required)	300		

Exit Save



Move to **Filters** tab and set up as indicated:

The screenshot shows the 'Filters' tab selected in the top navigation bar. Below the navigation bar, the 'Filter Details' section is visible. It contains three main settings: 'File Scope' set to 'All', 'File State (Required)' with checkboxes for 'All Files', 'Incomplete', 'New' (checked), 'In-Progress' (checked), 'Closed', 'Deleted', and 'Deleted-Inc', and 'Confidential Files' set to 'Both'. At the bottom right of the form, there are 'Exit' and 'Save' buttons.

Scroll all the way down to the **Additional Filters** and type in “signed off” and click on it:

This screenshot shows the 'Additional Filters' section at the bottom of the 'Filters' tab. Above this section are 'Confidential Files' (set to 'Both') and 'Important Files' (set to 'Include'). The 'Additional Filters' section has buttons for 'Edit in Full Screen', 'Copy', 'Paste', and 'Clear Expression'. Below these buttons is a search bar with a dropdown menu. The dropdown menu is open, showing 'signed off' as the selected option, followed by 'My Signed Off Files' and 'Signed Off'. At the bottom right, 'Exit' and 'Save' buttons are visible.

Go to **Select Operator**, and scroll almost all the way to the bottom to put in “is empty”:



The screenshot shows the 'Filters' tab in the PEER interface. Under 'Additional Filters', there are buttons for 'Edit in Full Screen', 'Copy', 'Paste', and 'Clear Expression'. Below these, a filter expression is being built. The first part is 'Signed Off' followed by a dropdown menu for 'Select Operator'. This menu is open, displaying a list of operators: 'contains', 'does not contain', 'is one of', 'is not one of', 'is current user's', 'is empty' (which is highlighted in blue), and 'is not empty'. To the right of the operator dropdown is a 'Type a Value' input field. At the bottom right of the filter section are 'Exit' and 'Save' buttons. The bottom status bar shows user information and session details.

The **Value** field will then disappear:

This screenshot shows the same 'Filters' tab, but now the 'is empty' operator has been selected. The 'Type a Value' input field has disappeared, leaving only the 'Signed Off' field and the 'is empty' operator in the filter expression. The 'Exit' and 'Save' buttons remain at the bottom right.



Move to the **Columns** tab before you Save; you can delete (by clicking on the little trash can) the File ID (it's already there in the highlighted tab, meaning you can't delete it) and the File Name because that is simply another manner to get to the file in one single click, just like the File ID so it's not needed.

To sort by **Event Date** move it over to the right side. Click the box and then the arrow to the left to move it over. Fields listed on the right will be displayed in your new view. The fields you move the to left will be used to sort.

Click **Save** and the view is now complete. Files will come out of the View once you have signed off on them.

The screenshot shows a configuration interface with three tabs: Settings, Filters, and Columns. The Columns tab is active. On the left, there is a list of fields with checkboxes and trash icons. On the right, a field 'Event Date (mm-dd-yyyy)' is selected and shown with a 'Descending' sort order. At the bottom right, there are 'Exit' and 'Save' buttons.

Settings	Filters	Columns	?
<input type="checkbox"/> Important		<input type="checkbox"/> Event Date (mm-dd-yyyy) Descending ▼	
<input type="checkbox"/> Confidential			
<input type="checkbox"/> File ID			
<input type="checkbox"/> Classification of Person Aff... ▼			
<input type="checkbox"/> General Event Type ▼			
<input type="checkbox"/> Last Name ▼			
<input type="checkbox"/> First Name ▼			
<input type="checkbox"/> Event Date (mm-dd-yyyy) ▼			
<input type="checkbox"/> Reported Event Severity ▼			

Exit Save