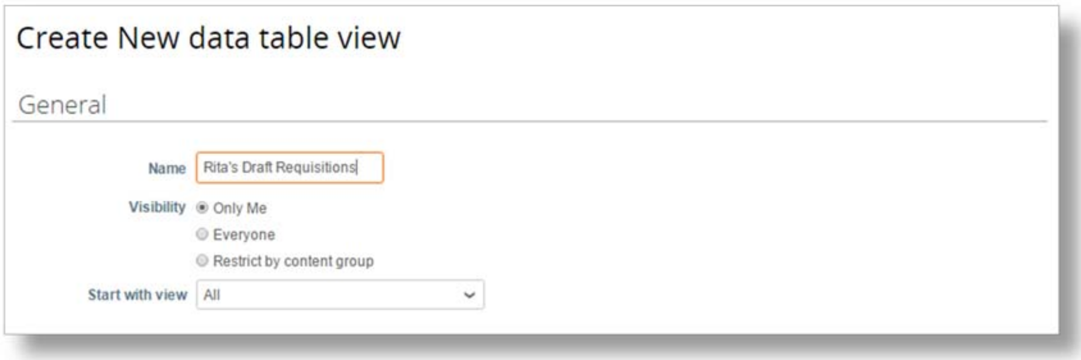
Create Custom View

You can create your own custom view in any B2P Spend History or module where there is a view option. The criteria for a new view can be as simple or complex as you require. In this example, we'll create a view that displays all draft requisitions created by one person.

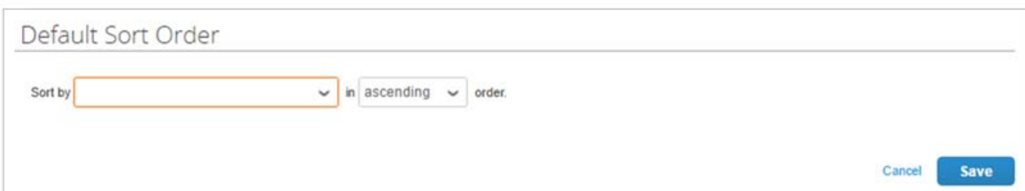
1. Open the Spend History tab or B2P module where you want to create your custom view.
2. From the **View** menu, select **Create View**. The window that opens is very long. We'll start with the top of it:



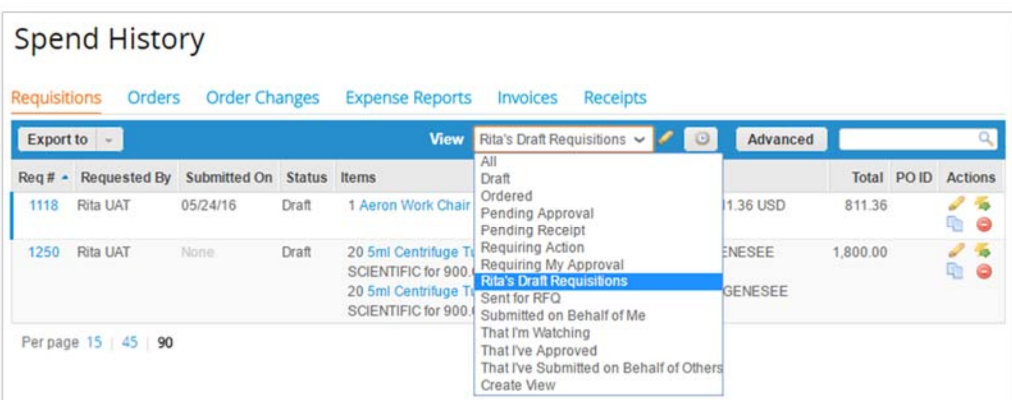
3. Give the new view a **Name** that clearly communicates the kind of information the view will provide.
4. Choose **Only Me** for a level of **Visibility**.
5. **Start with view** allows you to choose which view you would like to use as a template for your new view. By default, it is set to the All view.
6. Next, conditions need to be defined. This feature works the same as Advanced Search: select the field, choose the condition, and provide the field value.

7. You can create one or many conditions. Use the **add** and **delete** buttons to add or delete conditions.
8. Choose the **Apply** option you wish.
9. Next, you choose which columns you want displayed in the view.

10. To add a **Selected Column,** drag it from the Available list to the Selected list. To removed a selected column, drag it to the Available list.
11. Next, you define how the content in the view should be sorted.



12. You can only **sort by** one field. You can choose ascending or descending sort **order**.
13. Click **Save** to create the view. It should now display in your View menu.



14. **Review** your custom view to be sure it is correct. If you need to change or delete the view, click the Edit View pencil icon to open the form. Save and Delete options are at the bottom of the form.