**Incident SharePoint Finance View Creation**

1. To start open the finance folder of an Incident.

Graphical user interface, text, application, email

Description automatically generated

1. Next, be sure to open the finance files via SharePoint

Graphical user interface, text, application, email

Description automatically generated

1. Next, click on All Documents then click Save View As

Graphical user interface, text, application, email

Description automatically generated

1. Next, type Finance View and ensure there is a checkmark next to Make this a public view. Then click save.

Graphical user interface, text, application

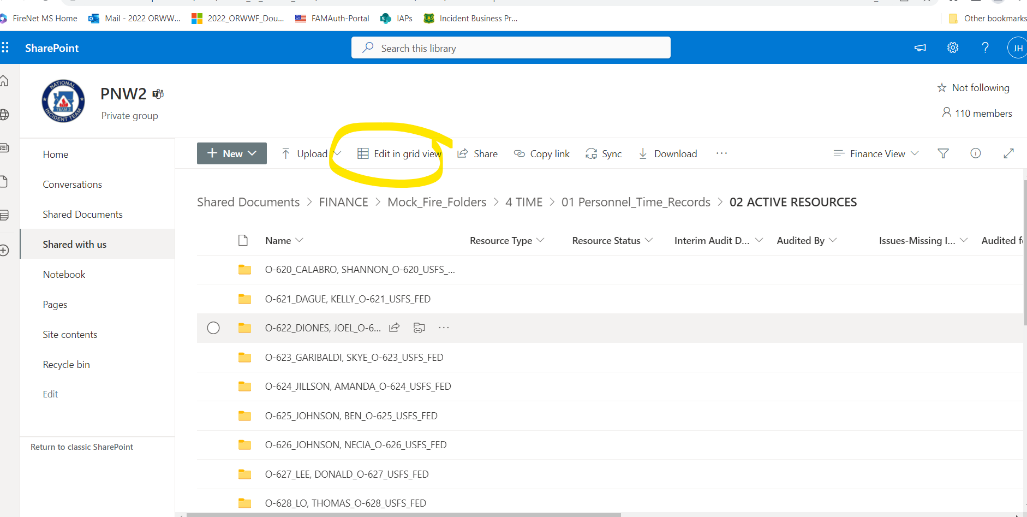
Description automatically generated

1. Next, Click +Add Column and begin adding the needed column categories.

Graphical user interface, text, application, email

Description automatically generated

1. Column Categories:
   1. Column 1: Name (automatic created)
   2. Graphical user interface, text, application, email

      Description automatically generatedColumn 2: Select Choice & Type: Resource Type. Click Add Choice and add a color for each type. Then click save.
      1. DOI AD – Light Blue
      2. FS AD – Red
      3. COOP – Yellow
      4. FED – Light Green
      5. VIPR – Light Purple
      6. EERA – Violet
      7. BUYT – Dark Blue
      8. National Contract – Gray
      9. CA/OES – Dark Green
      10. NERV – Dark Purple
      11. LUA – Teal
   3. Column 3: Select Choice & Type: Resource Status. Click Add Choice and add a color for each type.
      1. Active – Green
      2. Pending Demob (within 48 hours) - Yellow
      3. Demobed – Red
   4. Column 4: Select Date & Time & Type: Interim Audit Date
      1. Type: Date & Time
      2. Include Time: toggle to No
      3. Friendly format: toggle No
      4. Default: None
   5. Column 5: Select Person & Type: Audited By.
      1. Type: Person or Group
      2. Make sure Show Profile photos is toggled No
   6. Column 6: Select Text & Type: Issues-Missing Information
      1. Type: Multiple Lines of Text
      2. Description: Use this column to briefly explain any issues, please include your initials at the end.
   7. Column 7: Select Yes/No & Type: Audited for Payment
      1. Type: Yes or No
      2. Default: No
   8. Column 8: Select Text & Type: Batch Number:
      1. Type: Single line of text
   9. Column 9: Select Date & Time & Type: Date Batch submitted:
      1. Type: Date & Time
      2. Include Time: toggle to No
      3. Friendly format: toggle No
      4. Default: None
   10. Column 10: Modified (automatically created)
   11. Column 11: Modified By (automatically created)
   12. Column 12: Select Yes/No & Type: FSC Audit
       1. Type: Yes or No
       2. Default: No
2. To use Finance View and the columns effectively/efficiently, you will need to operate in Edit in grid view.