## Linking VIEWS to your Dashboard

For how to create VIEWS go to the NIMS Complaints Module Toolkit.

• <u>http://www.hse.ie/eng/services/yourhealthservice/Documentation/ncglt/Toolkit/</u>

Dashboards are unique to each Complaint Officer/User Account. By default Dashboards show the following:

- My formal complaints awaiting acknowledgement
- My formal complaints response overdue
- All open complaint issues
- All open complaint recommendations created by you

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3. You will be asked to select 2 options from the My Views Configuration Settings.

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Select Document Type Occurrence	•	
Select View Name FC Mental Health Commission	•	
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- 4. First you will be asked to select type, you will select EITHER, Incident, Task or Occurrence. In this case we created a VIEW in Occurrences so select **Occurrences**.
- 5. Then select the actual view. We created a View called '**FC Mental Health Commission**', this should appear on the list.
- 6. Save

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- 7. The selected live VIEW is now available permanently in your Dashboard
- 8. To Export the data in this View, select the arrow logo

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9. From the menu select the format of the export, i.e. JPG, PDF, Excel.

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- 10. The exported file will open in the programme you chose.