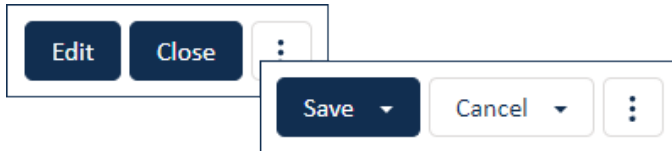# Viewing and Editing Records

Viewing and editing records allow you to see and change their content, respectively. To edit a record, click the Edit icon, usually a pencil. To view a record, click the record's ID, or the View icon if it appears. You can control the view and edit tools that appear on the table by editing the table's Views.

When you have a record open, you can tell whether you're viewing or editing it by looking at the available buttons. If you're viewing a record, you see the Edit and Close buttons, or only the Close button if you don't have edit permission for that record. If you're editing a record, you see the Save and Cancel buttons.

Edit and Cancel versus Save and Cancel buttons

While editing a record, you also see input boxes, drop-down fields, and radio buttons that allow you to make changes to the fields in the record.

Editing or viewing a record determines whether it's locked for other users. Viewing a record allows you to view a record's contents without locking other users from editing or viewing the record. Editing a record locks the record and prevents other users from editing it at the same time. In other words, multiple users can view a record at the same time, but only one user can edit a record at any given time.

> ⊘ When you're done editing a record, click Save or Cancel so that the record isn't locked for other users. Otherwise, by default, records are automatically unlocked after 60 minutes. Admins can adjust this time period by editing the Timeout: Record Lock Expiration Time global variable.

Saving and Canceling Record Edits

When you're editing a record, the following options appear when you click or hover over the drop-down arrow on the Save button:

- **Save & Continue**: Saves the record, runs any rules, and then reopens the record to the first tab to allow you to continue work on it. This can be useful to save your record progress.
- **Save & New**: Saves the record, runs any rules, and then opens a new record.
- **Save & Next**: Saves the record, runs any rules, and then opens the next record in the table.
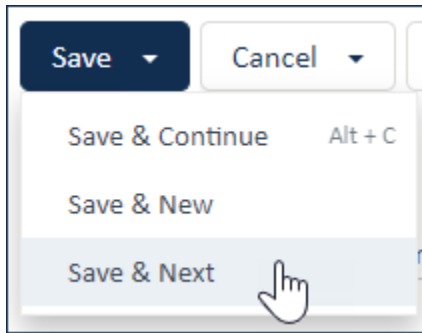
Save & Continue, Save & New, Save & Next shown in the drop-down menu

The following options appear when you click or hover over the drop-down arrow on the Cancel button:

- **Cancel & Reopen**: Cancels unsaved changes, and then closes and reopens the record to the first tab.
- **Cancel & New**: Cancels unsaved changes, closes the record, and then opens a new record.
- **Cancel & Next**: Cancels unsaved changes, and then opens the next record in the table.

The Save & Next and Cancel & Next options proceed to the next record in the list you started from, so you can easily work through your Email Inbox or My Assigned items. They allow you to work on the first record in the list and then proceed through the remaining records without having to manually close and open each one. If you use these options and the next record is locked by another user, has been deleted, or no longer meets the search criteria, the system moves to the next available record.

The options that appear under the Save and Cancel drop-down arrows are configurable from the Layout tab of the Table wizard.

Sharing Records

Easily share the record you're working on by clicking the ellipses menu and then Copy Link. This copies a URL to your clipboard that you and others can use to jump directly to this record.
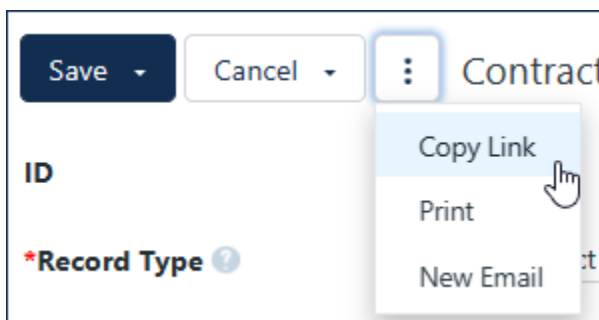
These links are encrypted for security, and they respect user permissions, so you don't need to worry about them getting forwarded to a third party. If you click a link to a record in a KB you're already working in, the link opens right away so you can get right to work. Otherwise, you're prompted to log in, and then brought directly to view the record. If you need to make changes, simply click Edit.