

# Copy a View

Home > EMResource > Guide - View Setup > Copy a View



Authorized administrators can use an existing view as a "template" for a new view by copying it, and then changing its detail, status types, and resources.

## To copy a view

1. In the main menu, click **Setup** and then click **Views**. The *Region Views List* opens.
2. Locate the view and, on that row, click **Copy**. The *Create View: Copy* page opens to the **General** tab.
3. On each tab, enter the appropriate information, then click **Next**.

<b>General tab</b>	
View Name	Specify the name of the view (required). This name appears in the <b>View</b> menu and in the view's header.
Description	Enter a description of the view. The description is for administrative purposes only.
Select Sub-Resources Types to be included in the view	Select the sub-resource types that can be available in the view. When selected, the primary sub-resource of that type may appear in the view, depending on other selections you make.
<b>Regions tab</b>	
Select regions to be included in this view.	Select one or more regions to include in the view.
<b>Resources tab</b>	
Select resources to be included in this view.	Select resources to include in the view. <i>Tip: You can sort the list by name or you can use the search fields at the top to locate the specific resources.</i>
<b>Status Types tab</b>	
Select status types to be included in this view.	Select status types to include in the view. You can include daily and event-only status types. <i>Tip: You can sort the list by name or you can use the search fields at the top to locate the specific status types.</i>
<b>Sort Status Types tab</b>	
Adjust sort order for selected status types.	Specify the order in which the status types should be displayed in the view. You can also specify alphabetic order by clicking the <b>Sort alphabetically</b> option at the bottom of the tab.
<b>Advanced tab</b>	
Configure settings for resource types in this view.	Configure each of the <b>Resource Types</b> listed and specify the order in which the resource types appear in the view. By default, all options are selected. You can include the <b>New Resource Types added in future</b> option when setting the order. If new resource types are added in the future, they appear in the view where this option appears in this list.
Region	Region to which this resource type belongs.
Resource Type	Resource types included in the view. You can change the name that appears in the view for these resources. This comes in handy when creating multi-region views since Resource Type names may be repeated among regions. Or, you might want to change the name to one that fits better with this particular view.

Statuses by Column	Select to show statuses in the view in columns rather than rows (not selected).
Comments	Select to show in the view any comments that were entered the last time the status was updated.
Timestamp	Select to show in the view the date and time of the last update to the status.
User	Select to include in the view the name of the user who last updated the status.
Future Resources	Select to automatically include in the view any resources that are added to the resource type in the future.
Sort Resources	Sort resource information by choosing one of the following: <b>Name</b> , <b>Status</b> , <b>Custom</b> .  If you choose <b>Name</b> , select ascending or descending order.  If you choose <b>Status</b> , select the status by which to sort and, if appropriate, select ascending or descending order.  If you choose <b>Custom</b> , set the sort order for resources or specify they should be sorted alphabetically.
New Resource Types added in future	Select to automatically include in the view any resource types that are added to the region in the future.  You can only specify this option for the originating region that is, the region you or another user was logged into when the new view was set up.
Sort buttons	For quick sorting, use the buttons at the bottom of the table to sort by region, resource type, or region and resource type.
Other Options: Display Status Type Summary	Select to include grand totals at the bottom of the view. A grand total appears for each numeric status type that is set up to display summary totals.
Fix columns width	Select to apply a fixed width to the <b>Comments</b> , <b>Last Update</b> time, and last update <b>By User</b> columns.
<b>Users tab</b>	
Security	Select the check box to make the view available to all users in all selected regions or clear it to select individual users.

4. Click **Save**.