Duplicating Views

The term "Views" in PlayMaker describes the data that is being shown when a user clicks on the Accounts, Contacts or Referrals tab. This article will describe the process of creating a new view by duplicating an existing view.

- Defining Views provides an overview of what views are in PlayMaker as well as how they are most commonly used.
- Views can also be created from scratch, a process that is covered in Creating New Views.

Why Duplicate a View?

A user would want to duplicate a view when they may want to have all of the same data visible but with a different timeframe, for a different user or area, etc.

Quick reminder, when creating and editing views, it is important to know that some views are global. Global views are seen by all users and should only be edited by Administrators. If a user choses to edit a global view, a warning will be displayed stating that the view is global (shown above). **Changes made and saved to a global view will modify the view for all users.** Instead of editing the global view, we suggest that user duplicate the view to tailor it to fit their needs.
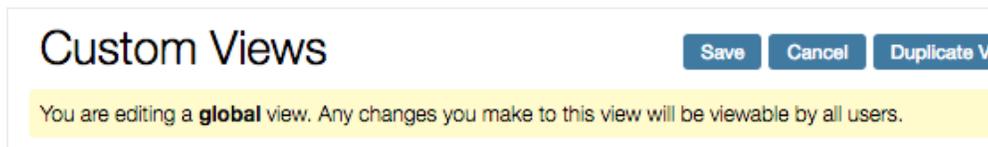
Duplicate an Existing View:

- Navigate to the section that you would like to create a view for - Accounts, Contacts, or Referrals
- Load the view that you want to duplicate by selecting it from the *Change View* drop-down menu

- Once the view has loaded, click the *Edit View* link next to the C*hange View* drop-down menu (pictured below)
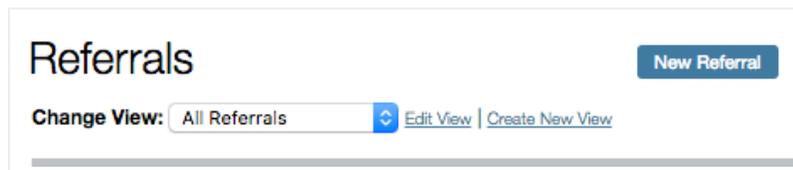
- Click the *Duplicate View* button (shown below, to the right of the *Cancel*button)

- A pop-up will prompt to enter a name for the view.
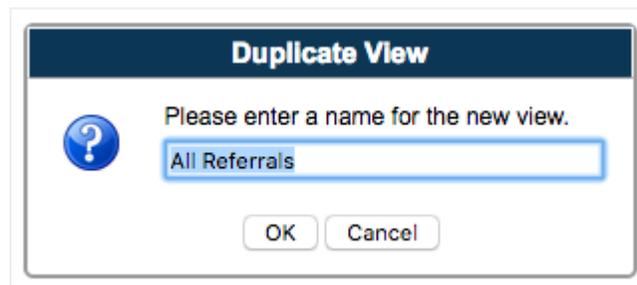
- Type in a new name for the duplicated view, then click *OK*.
    - When naming views, PlayMaker suggests that users are as descriptive as possible. This makes it easy to understand what will data will load when the view is selected from the *Change View* drop-down.
    - As an example, a view that contains all admits for the past 90 days might be called "All Admits - 90 Days."

- The new view will save, displaying all of the filtering options available for that view.
- Any of the fields discussed in the last article (*Creating New Views*) can now be adjusted to match the desired data needs. Once the user is satisfied with adjustments, clicking *Save* will load the new view. Any necessary adjustments desired after viewing the results can be made by editing the view.