## How to Change the Display of a Portlet

1. To **temporarily change how information is listed**, hover over a column header until a down arrow appears. Select the arrow, then select from the menu to:
   - Sort in ascending or descending order
   - Show/hide the columns that appear in the list
   - Apply a filter to display only certain types of information

   Note: These changes apply to the current session only
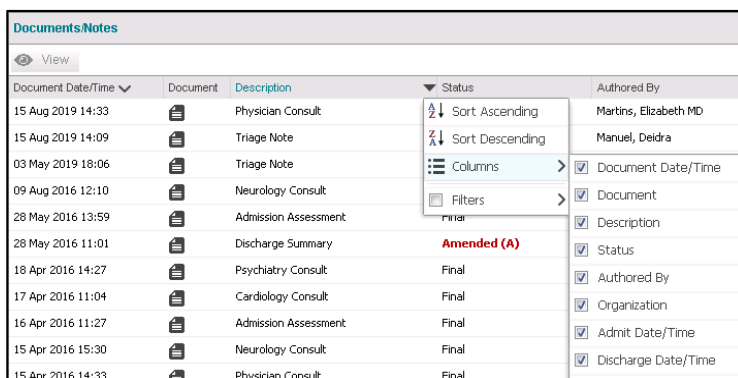
2. To **permanently change your view preferences** (for columns that are not locked):
   a) Select **Preferences**, then **List Display Settings**
   b) To show/hide columns, select an item in Available Columns/Displayed Columns. Select **Display/Hide**
   c) To change the order in which the columns appear, select the item. Select **Move Up** or **Move Down**
   d) To change the **Default Sort Column**, select the down arrow, then select an item from the list
   e) Select the **down arrow** to specify the sort order
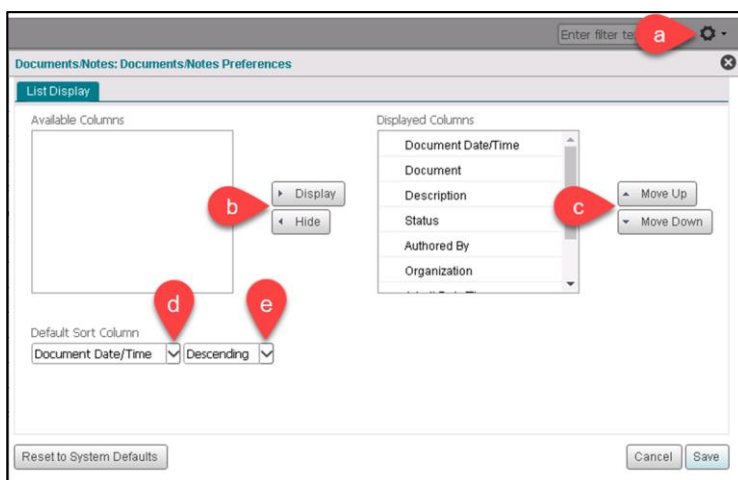
How to Set Timeline Preferences

To **permanently change the timeline** for all patients and for every time you log in:

1. On the Timeline, select **Preferences**, then **General Settings**
2. In Timeline Preferences:
   a) Select the desired default time interval
      Note: It is not possible to select a custom interval
   b) Select the desired encounter types to display
   c) Select **Save**
   d) Select **Reset to System Defaults** to permanently return to original Timeline preferences
3. The Timeline refreshes to reflect the preferences set.

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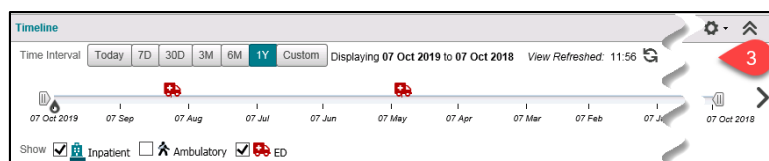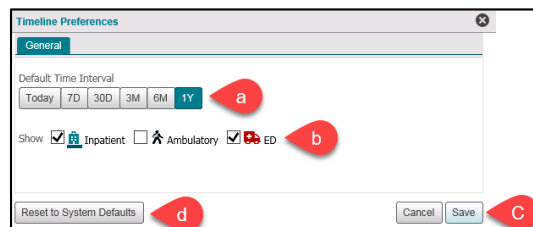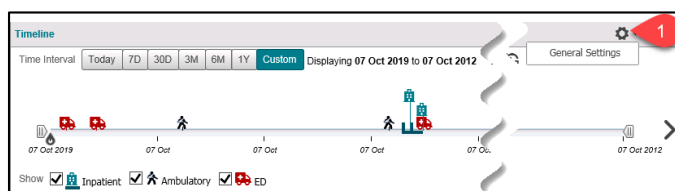
How to Use Custom Views (My Views)
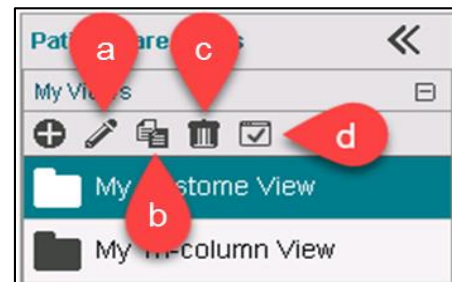
Creating a Custom View

1. From the Patient Care tab, select the **double arrow** on the top of the navigation bar to expand it

2. Select the ⊕ **Add New** icon

   Note: If the Add New icon is not visible, select the My Views heading or the ⊞ Expand icon

3. Select **Single Column Layout** or **Three Column** Layout

4. Choose the portlets for your custom view:

   a) Select an available portlet, then select **Add**

   OR

   b) Drag and drop a portlet into the **Clinical View Layout** frame

5. Enter the **name** of your new view

6. Enter a **description** of the view, as needed (optional)

7. Select an appropriate icon for the view

8. To change the columns displayed in the portlet:

   a) Select the **Preferences** ⚙ ˅ icon and **List Display Settings**

   OR

   b) Three-column layout: select the **Actions** ☰ ˅ icon and select **Preferences** > **List Display Settings**

9. To change the order of portlets:

   1. Drag and drop the portlet above or below other portlets

   OR

   2. Select the up and down arrows

10. To remove a portlet from the view, select the **Remove** icon. In Three Column Layout, select the ☰ ˅ button to display **Remove**

11. Set the new view as your default clinical view, as desired

12. Select **Save**
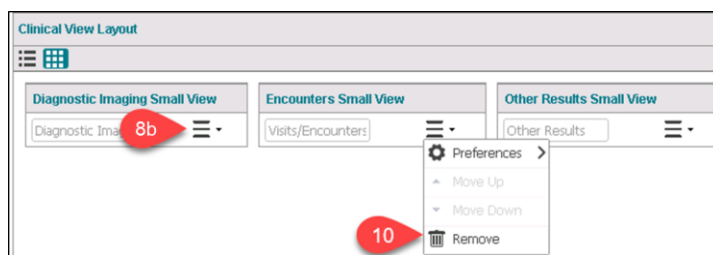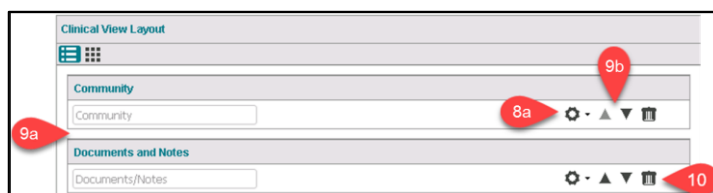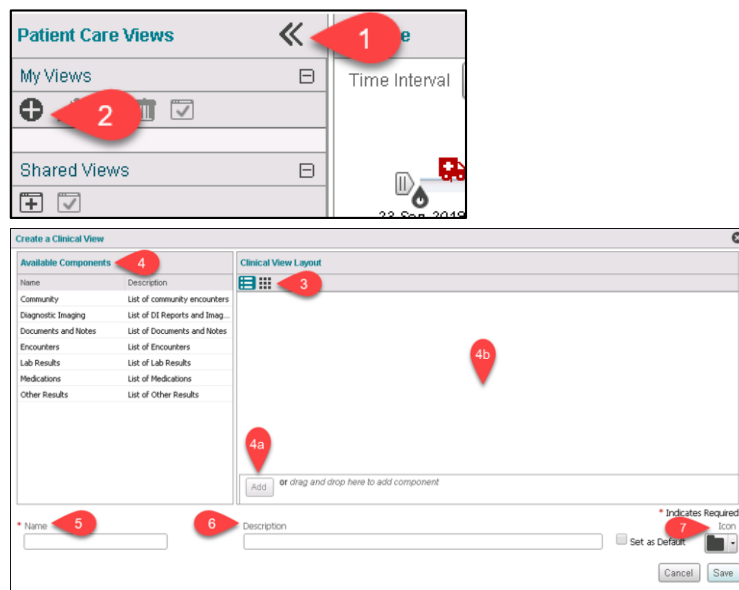
Reminder: By default, the Timeline and Patient Banner display as the first two components at the top of any view and cannot be removed or modified. Remove any unnecessary portlets and/or columns to minimize avoidable viewing of personal health information (PHI).

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Working with Custom Views

1. With the navigation bar expanded, select a custom view, then perform one of the following actions:
   a) **Edit** the view in order to select a different layout, add/remove portlets, change the name, etc. (Follow steps 3-12 of Creating a Custom View)
   b) **Duplicate** a view to create a copy of the selected view that you can then use for another purpose
   c) **Delete** a view when it is no longer required
   d) **Set** the selected view as the default view

Note: To change the layout of a clinical view, edit the view and select Single Column layout or Three Column Layout. You will need to add the portlets back into the Clinical View Layout frame.

Creating a Custom View from a Shared View

Shared Views are predefined clinical views. Although Shared Views cannot be modified, you can create your own customized version under My Views.

1. With the navigation bar expanded, select a shared view
2. Select **Add to My Views**
3. Select the copy from the My Views list
4. Select **Edit** to customize the view. (Follow steps 3-12 of Creating a Custom View)

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